

What are the trends in Travel & Tourism that are emerging during the Covid-19 pandemic and ... How can the Portuguese tourism Accommodation's ecosystem adapt to the changes and become competitive in the post Covid-19 world?

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Work project carried out under the supervision of: José Miguel Pita

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Section	Subsection	Takeaways
5. Lasting trends	5.1 Structural Changes	<ul style="list-style-type: none"> The low-touch economy, domestic tourism, less business travel and sustainable tourism are lasting trends
	5.2 Adapt to Structural Changes	<ul style="list-style-type: none"> Covid-19 urged the normalization of the low touch economy which has become a lasting trend Technology-related measures continue to be valued after the pandemic by consumers Consumers want to continue travelling in the coming months, preferably in their own countries The technological transition that existed during the pandemic may result in a reduction in business travel in the "new normal" Tourism is directly linked to three sustainable development goals The Portuguese strategy for the next years is to become a renowned sustainable destination
	5.3 Best practices	<ul style="list-style-type: none"> Some Accommodations around the world are references in digital transformation and domestic tourism Best practices from accommodations around the world include the "bleisure" concept and positive ecological footprint
6. Planning Ahead	6.1 Scenario Forecasting	<ul style="list-style-type: none"> The factors that have a higher impact on the recovery of international tourism are travel restrictions, Covid-19 propagation, low consumer confidence and poor economic environment The UNWTO estimates that International tourist arrivals for 2020 could drop between -58% and -70% compared with 2019 The most likely recovery scenario for developed economies to attain the herd immunity threshold is Q3 or Q4 of 2021 The UNWTO experts expect there will be a rebound of International Tourism in 2021 during the third quarter and it will return to 2019 levels after 2022 OECD predicts an upside scenario for the Global GDP recover 4.2% by 2021 and a downside scenario where GDP could fall 5%
	6.2 Recommendations for the sector	<ul style="list-style-type: none"> Facing the challenges this crisis brought, the Accommodations' managers in Portugal should be Ready, Willing and Able to adapt to the "New Normal" The recommendations for the Accommodation's sector are divided into two perspectives: consumers and suppliers In the gradual return to the "New Normal" health and safety measures remain the number one priority Domestic Tourism will be an important driver for the recovery of Portuguese Travel & Tourism sector Business Travel will have a gradual recovery characterized by the geographical proximity, interactivity and sector In a secure but fun world, we will see a technological evolution that will be accompanied by a sustainable transition
	6.3 Implementation Roadmap	<ul style="list-style-type: none"> Accommodations will require the capability to implement the measures today to ensure sustainability and competitiveness in the foreseen future

Keywords: Travel & Tourism, Covid-19, lasting trends, accommodation, "New Normal", structural changes

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What are the trends in Travel & Tourism that are emerging during the Covid-19 pandemic and ...
How can the Portuguese tourism Accommodation's ecosystem adapt to the changes and become competitive in the post Covid-19 world?

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Academic adviser: José Miguel Tito

Overall Agenda – Structure and Questions

Module	Section	Research Questions
Context Analysis: The "Old Normal"	1. Travel & Tourism Overview	How important is the Travel & Tourism sector for the economy? 1.1 What is the impact of the Travel & Tourism industry in the world? 1.2 Why do tourists choose Portugal?
	2. Accommodation's ecosystem analysis	How important is the Accommodation's ecosystem for Travel & Tourism in Portugal? 2.1 How has the evolution of the accommodation industry in Portugal been characterized over time? 2.2 What are the main means of transport and the channels that tourists use more frequently in Portugal? 2.3 What are the transforming trends that are appearing in the Accommodation's ecosystem?
Covid-19: The Situation Now	3. The virus' impact	How has Covid-19 impacted the Travel & Tourism sector and the Accommodation's ecosystem? 3.1 What happened in the Travel & Tourism sector in 2020? 3.2 How Covid-19 affected Travel & Tourism in Portugal? 3.3 What happened with the Accommodation's ecosystem?
	4. Emerging trends	How did the consumer preferences changed and how are the Accommodation suppliers adapting? 4.1 What are the factors that stand out in terms of consumer and suppliers? 4.2 How did the measures implemented by the sector influenced the choice of accommodation? 4.3 How has the sector been able to survive during the pandemic?
Path Forward: The "New Normal"	5. Lasting trends	From the analysis done, what structural changes will impact the Accommodation's ecosystem? 5.1 From the analysis done, what structural changes will impact the Accommodation's ecosystem? 5.2 How can the Accommodation's managers adapt and prepare for the lasting trends post-Covid-19? 5.3 What are some of the best practices of tourist accommodations in the world?
	6. Scenario forecasting	How will the Accommodation's managers adapt their strategy in order to succeed in the "New Normal"? 6.1 What are the future scenarios that will lead the recovery of global travel? 6.2 Are the Accommodation's managers ready, willing and able to implement changes? 6.3 What should be the priority of the measures to implement?

Keywords: Travel & Tourism, Covid-19, emerging trends, Portugal, Accommodation's ecosystem

MODULE I

What was the context before Covid-19?

Context Analysis: The "Old Normal"

Travel & Tourism is one of the largest sectors of the world's economy. It employs more than 300 million people across the globe. It has been one of the fastest growing and most innovative sectors. The industry has a very important role to play in achieving prosperity, growth and economic development.

It is a sector of high value for the global economy and our objective is to analyse the context before the Covid-19 pandemic hit.

Executive Summary - Context Analysis: The "Old Normal"

Section	Subsection	Follow-up questions	Methodology
1. Travel & Tourism Overview	1.1 Travel & Tourism: A global industry	What is the impact of the Travel & Tourism industry in the world? <ul style="list-style-type: none">• The Tourism and Travel industry is an industry worth \$1.3 trillion (2019)• It represents one-third of all jobs, which makes it one of the largest employment opportunities in the world• It is the fastest growing sector of the world economy, growing at 4.5% per year	Secondary Data research: UNWTO, World Bank, OECD, Portugal, etc.
	1.2 Travel & Tourism in Portugal	How important is Travel & Tourism for the Portuguese economy? <ul style="list-style-type: none">• In 2019, the sector contributed 10.5% to the Portuguese GDP• In 2019, there were 400 thousand people employed in the sector• It is the sector with the highest contribution to the Portuguese GDP	
	1.3 Portugal as a T&T destination	Why do tourists choose Portugal? <ul style="list-style-type: none">• Natural and human resources have made Portugal one of the best tourist destinations, but there is room for improvement	
2. The Accommodation industry in Portugal	2.1 The Accommodation industry in Portugal	How important is the Accommodation industry for Travel & Tourism in Portugal? <ul style="list-style-type: none">• Between 2014 and 2019, there was an increase in the number of hotels in Portugal, from 10,000 to 11,000• The number of hotels in Portugal is the highest in the world, followed by the United States and the United Kingdom• The number of hotels in Portugal is the highest in the world, followed by the United States and the United Kingdom	Secondary Data research: UNWTO, World Bank, OECD, Portugal, etc.
	2.2 Preferences in channels and means of transport	What are the main means of transport and the channels that tourists use more frequently in Portugal? <ul style="list-style-type: none">• Air transport is the most frequent mode of transport, followed by road transport• The most frequent channels are online travel agencies, followed by travel agents	
	2.3 Transforming trends	What are the transforming trends that are appearing in the Accommodation's ecosystem? <ul style="list-style-type: none">• Some of the major transforming trends that are appearing in the industry over the last few years are related to sustainability, technology and wellness	



Key Takeaways - Context Analysis: The "Old Normal"

Section	Subsection	Takeaways
1. Travel & Tourism Overview	1.1 Global industry	• In 2019, the total economic impact of the Travel & Tourism industry to the global GDP was 10.5% • The Travel & Tourism industry accounts for 10.5% of total employment in 2019, which represents one-third of all jobs • It represents one-third of all jobs, which makes it one of the largest employment opportunities in the world
	1.2 Travel & Tourism in Portugal	• The Travel & Tourism sector in Portugal has been growing fast, reaching 10.5% with a total impact on the GDP of 10.5% • Between 2014 and 2019, there was an increase in the number of hotels in Portugal, from 10,000 to 11,000 • The number of hotels in Portugal is the highest in the world, followed by the United States and the United Kingdom
	1.3 Portugal as a T&T destination	• Portugal is an attractive tourist destination with many positive natural and human resources but there is still room for improvement
2. The Accommodation industry in Portugal	2.1 The Accommodation industry in Portugal	• Between 2014 and 2019, there was an increase in the number of hotels in Portugal, from 10,000 to 11,000 • The number of hotels in Portugal is the highest in the world, followed by the United States and the United Kingdom
	2.2 Preferences in channels and means of transport	• Air transport is the most frequent mode of transport, followed by road transport • The most frequent channels are online travel agencies, followed by travel agents
	2.3 Transforming trends	• Some of the major transforming trends that are appearing in the industry over the last few years are related to sustainability, technology and wellness

MODULE II

How is the situation during Covid-19?

Covid-19: The Situation Now

Travel & Tourism is facing unprecedented challenges, and an existential threat to the industry. The Covid-19 pandemic has led to a sharp decline in travel and tourism, with many businesses facing financial difficulties. The industry is currently in a state of crisis, and it is essential that governments and industry leaders work together to address the challenges and ensure the sector's recovery.

Global tourism ministers, President & CEO World Travel & Tourism Council

Executive Summary - Covid-19: The situation Now

Section	Subsection	Follow-up questions	Methodology
3. The virus' impact	3.1 Travel & Tourism: A global industry	How has Covid-19 impacted the Travel & Tourism industry and the Accommodation's ecosystem? <ul style="list-style-type: none">• Covid-19 has led to a sharp decline in travel and tourism, with many businesses facing financial difficulties• The recovery of the Travel & Tourism industry is expected to be slow and gradual	Secondary Data research: UNWTO, World Bank, OECD, Portugal, etc.
	3.2 Travel & Tourism in Portugal	How has Covid-19 impacted the Travel & Tourism industry in Portugal? <ul style="list-style-type: none">• In 2020, the sector contributed 10.5% to the Portuguese GDP• In 2020, there were 400 thousand people employed in the sector• It is the sector with the highest contribution to the Portuguese GDP	
	3.3 The impact of the Accommodation's ecosystem	How has Covid-19 impacted the Accommodation's ecosystem? <ul style="list-style-type: none">• The Accommodation's ecosystem has been severely impacted by the pandemic, with many businesses facing financial difficulties	
4. Emerging trends	4.1 The Covid-19 impact on the Accommodation's ecosystem	How did the consumer preferences changed and how are the Accommodation suppliers adapting? <ul style="list-style-type: none">• Between 2014 and 2019, there was an increase in the number of hotels in Portugal, from 10,000 to 11,000• The number of hotels in Portugal is the highest in the world, followed by the United States and the United Kingdom	Primary Data research: UNWTO, World Bank, OECD, Portugal, etc.
	4.2 Behavioral change in the Sector	What are the main means of transport and the channels that tourists use more frequently in Portugal? <ul style="list-style-type: none">• Air transport is the most frequent mode of transport, followed by road transport• The most frequent channels are online travel agencies, followed by travel agents	
	4.3 Normalization of the Sector	What are the transforming trends that are appearing in the Accommodation's ecosystem? <ul style="list-style-type: none">• Some of the major transforming trends that are appearing in the industry over the last few years are related to sustainability, technology and wellness	



Key Takeaways - Context Analysis: "Covid-19: The situation now"

Section	Subsection	Takeaways
3. The virus' impact	3.1 Travel & Tourism: A global industry	• The Covid-19 virus spread rapidly throughout the world, causing an unprecedented health and economic crisis • The Travel & Tourism industry has been severely impacted by the pandemic, with many businesses facing financial difficulties
	3.2 Travel & Tourism in Portugal	• In 2020, the sector contributed 10.5% to the Portuguese GDP • In 2020, there were 400 thousand people employed in the sector • It is the sector with the highest contribution to the Portuguese GDP
	3.3 The impact of the Accommodation's ecosystem	• The Accommodation's ecosystem has been severely impacted by the pandemic, with many businesses facing financial difficulties
4. Emerging trends	4.1 The Covid-19 impact on the Accommodation's ecosystem	• Between 2014 and 2019, there was an increase in the number of hotels in Portugal, from 10,000 to 11,000 • The number of hotels in Portugal is the highest in the world, followed by the United States and the United Kingdom
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	4.3 Normalization of the Sector	• Some of the major transforming trends that are appearing in the industry over the last few years are related to sustainability, technology and wellness

MODULE III

How will the "New Normal" be like?

Path Forward: The "New Normal"

The return to the new normal is uncertain as there is no specific date for the recovery of the industry. The industry is currently in a state of crisis, and it is essential that governments and industry leaders work together to address the challenges and ensure the sector's recovery.

Global tourism ministers, President & CEO World Travel & Tourism Council

Executive Summary - Path Forward: The "New Normal"

Section	Subsection	Follow-up questions	Methodology
5. Lasting trends	5.1 Structural changes	What are the lasting trends that will impact the Accommodation's ecosystem? <ul style="list-style-type: none">• The Accommodation's ecosystem has been severely impacted by the pandemic, with many businesses facing financial difficulties	Secondary Data research: UNWTO, World Bank, OECD, Portugal, etc.
	5.2 Adaptation to the structural changes	How can the Accommodation's managers adapt and prepare for the lasting trends post-Covid-19? <ul style="list-style-type: none">• The Accommodation's managers should focus on sustainability, technology and wellness	
	5.3 Best practices	What are some of the best practices of tourist accommodations in the world? <ul style="list-style-type: none">• Some of the best practices of tourist accommodations in the world are related to sustainability, technology and wellness	
6. Planning ahead	6.1 Scenario forecasting	What are the future scenarios that will lead the recovery of global travel? <ul style="list-style-type: none">• Between 2014 and 2019, there was an increase in the number of hotels in Portugal, from 10,000 to 11,000• The number of hotels in Portugal is the highest in the world, followed by the United States and the United Kingdom	Primary Data research: UNWTO, World Bank, OECD, Portugal, etc.
	6.2 Recommendations for the sector	What are the main means of transport and the channels that tourists use more frequently in Portugal? <ul style="list-style-type: none">• Air transport is the most frequent mode of transport, followed by road transport• The most frequent channels are online travel agencies, followed by travel agents	
	6.3 Implementation Roadmap	What are the transforming trends that are appearing in the Accommodation's ecosystem? <ul style="list-style-type: none">• Some of the major transforming trends that are appearing in the industry over the last few years are related to sustainability, technology and wellness	



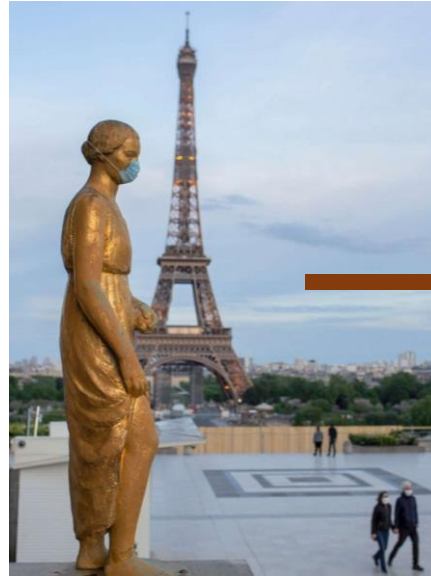
Key Takeaways - Path Forward: The "New Normal"

Section	Subsection	Takeaways
5. Lasting trends	5.1 Structural Changes	• The Accommodation's ecosystem has been severely impacted by the pandemic, with many businesses facing financial difficulties
	5.2 Adapt to Structural Changes	• The Accommodation's managers should focus on sustainability, technology and wellness
	5.3 Best practices	• Some of the best practices of tourist accommodations in the world are related to sustainability, technology and wellness
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Total Submission slides: 75

Executive Summary - Path Forward: The “New Normal”

Section	Subsection	Follow-up questions	Methodology
5. Lasting Trends	5.1 Structural changes	<p>From the analysis done, what structural changes will impact the Accommodation’s ecosystem?</p> <p>Which emerging trends will become lasting trends?</p> <ul style="list-style-type: none"> The low touch economy, domestic tourism, less business travel and sustainable tourism are lasting trends that are affecting the Accommodation’s ecosystem 	<p>Primary data: Survey</p> <p>Secondary data: Board of Innovation, McKinsey, Oliver Wyman, Turismo de Portugal, UNWTO, WTTC</p> <p>Literature review</p>
	5.2 Adaptation to the structural changes	<p>How can the Accommodation’s managers adapt and prepare for the lasting trends post-Covid-19?</p> <ul style="list-style-type: none"> Covid-19 was a catalyst for the digital transformation of businesses Sustainability is one of the main themes for the coming years, both in national and global tourism Domestic tourism will be a key driver for the recovery of tourism The technological shift may result in a reduction in business travel for the “next normal” 	
	5.3 Best practices	<p>What are some of the best practices of tourist accommodation in the world?</p> <ul style="list-style-type: none"> Several hotels are global references in sustainability and technological transformation practices 	
6. Planning Ahead	6.1 Scenario forecasting	<p>How will the Accommodation’s managers adapt their strategy in order to succeed in the “New Normal”?</p> <p>What are the future scenarios that will lead the recovery of global travel?</p> <ul style="list-style-type: none"> Building scenarios is important to structure the analysis of the future. Although they are not predictions, they can help reduce the complexity 	<p>Primary data: Survey</p> <p>Secondary data: Deloitte, UNWTO, CDC, McKinsey & Company, Germany Travel, OECD, PwC, FDA, WHO, Nielsen, NextGuest</p> <p>Literature Review</p>
	6.2 Recommendations for the sector	<p>Are the Accommodation’s managers ready, willing and able to implement changes?</p> <ul style="list-style-type: none"> This crisis can be a turning point to find solutions for a stronger and more resilient recovery The recommendations for the sector are based both on the sector emerging and lasting trends and on the short- and long-term consumer needs 	
	6.3 Implementation Roadmap	<p>What should be the priority of the measures to implement?</p> <ul style="list-style-type: none"> The measures should be prioritized to first address the Covid-19 health and safety concerns The road to implement the measures is long and arduous that only the most resilient Accommodations will be able to do 	



How will the “New Normal” be like?

Path Forward: The “New Normal”

The return to the new normal is uncertain as there is no specific date of transition from the pandemic period to the next, a transition that will be gradual and different from country to country. However, with the scientific advances announced regarding different vaccines, this “new normal” may be close and there are trends that have emerged during the pandemic that will last and scenarios that can be made.

Some of the emerging trends brought by Covid-19 have turned into lasting trends

Some of the lasting trends influence the emergence of others such as the new technologies that have reinforced the low touch economy and reduced business travel



Low touch economy

The lack of **physical contact** during the pandemic is here to stay in the future

Low touch solutions have been a priority in many tourists accommodations and the fact that it is **well received** by guests make it a lasting trend



Domestic tourism

The restrictions imposed on movement between borders and the **uncertainty** characteristic of the evolution of the pandemic have reinforced the importance of domestic tourism and it has become essential for the gradual recovery of the times ahead



Less business travel

The pandemic has transformed businesses and new **remote communication** strategies have been adopted, resulting in a reduction in business travel



Sustainable tourism

Greater **environmental concern** on the part of institutions and the general population and the **urgency** of solutions to control climate change make sustainable tourism a trend to be observed in the coming years

Covid-19 urged the normalization of the low touch economy which has become a lasting trend

Contactless was one of the key words during the pandemic and will continue to be in the low touch economy

Covid-19 urged the normalization of the low touch economy...

- Doubts regarding the possibility of contracting coronavirus by touching objects and surfaces and the need of social distancing have resulted in **the emergence of the low touch economy**.
- During the pandemic there were changes in the **behaviour of consumers** who preferred ecommerce rather than buying products physically in shops, which resulted in an increase in human resources and investment in the improvement of digital channels by many companies.
- Tourist accommodations were no exception as those that had not done this development before, had to adapt by **implementing new contactless solutions** and **strengthening the presence in digital channels**, an investment which, in most cases, is made in the long term.

... which has become a lasting trend and with changes in several sectors.

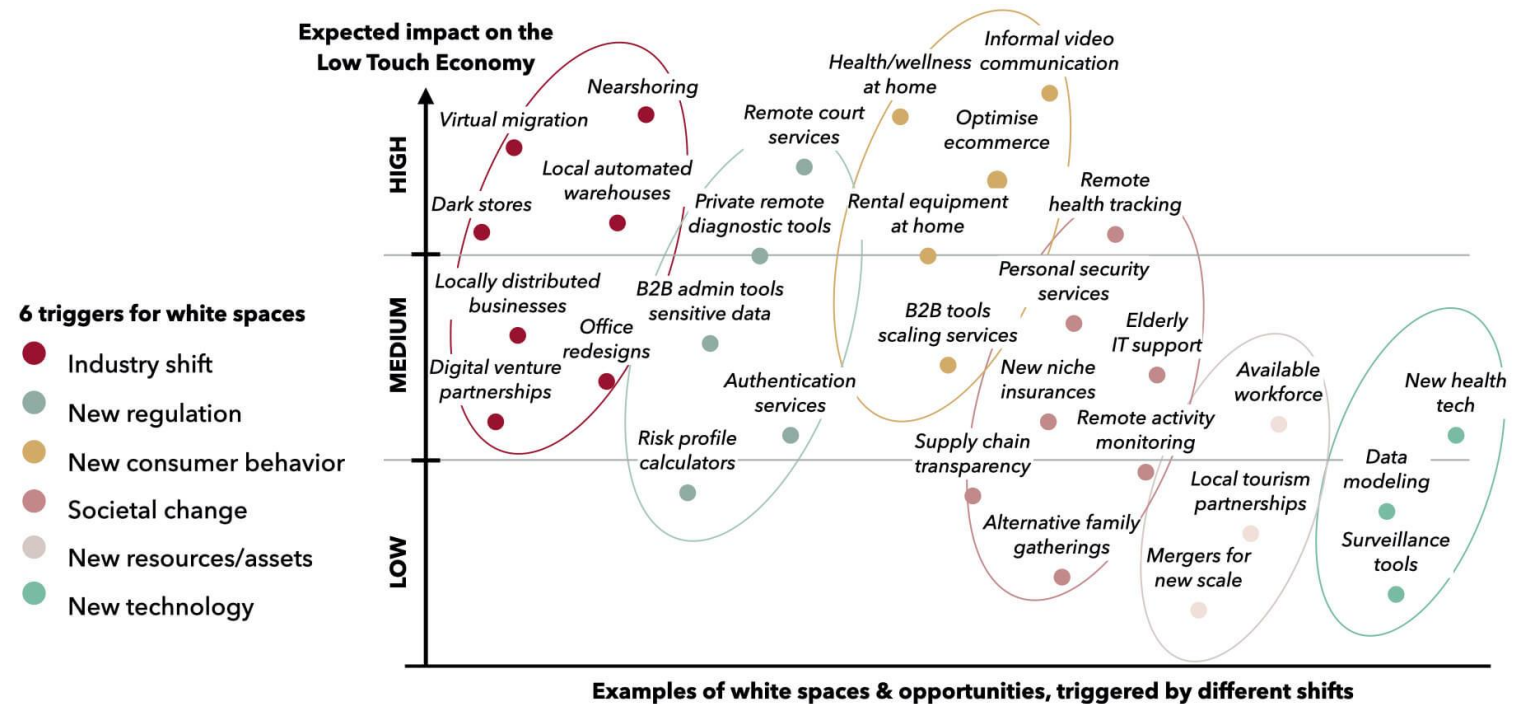


Figure 59: Low touch economy. Source: Board of innovation, 2020

Source: Sorrels, Board of Innovation

Technology-related measures continue to be valued after the pandemic by consumers

Reservations to use Accommodations' amenities and contactless check-in check-out are two measures that consumers value more in the "new normal"

Technology-related measures continue to be valued after the pandemic by consumers

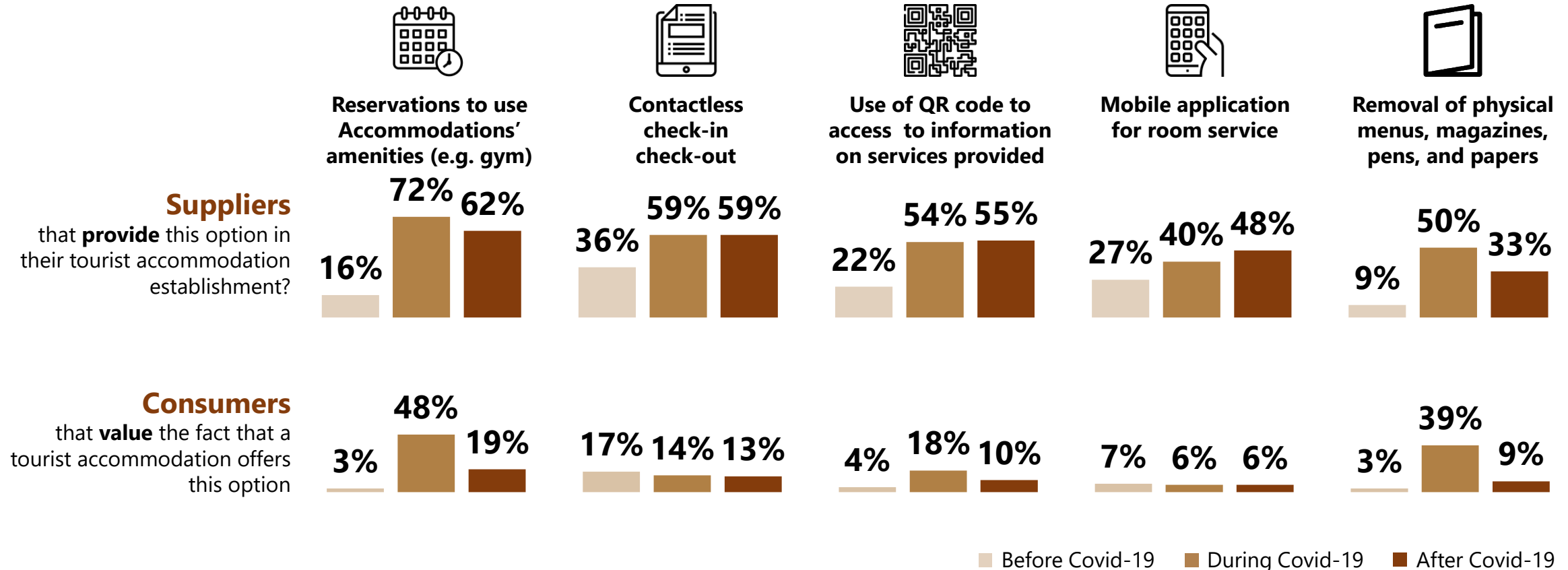


Figure 60: How consumers and suppliers value some of the measures before, during and after Covid-19 **Source:** Primary data

Source: Primary data

Consumers want to continue travelling in the coming months, preferably in their own countries

53% of tourists have reservations for the next six months and 31% indicate that they do not have yet but want to travel

Consumers want to continue travelling in the coming months...

- The **uncertainty** for the coming months is evident as **31%** of respondents want to travel in the next six months but have not yet made reservations to follow the evolution of the pandemic. Despite this, more than half of the respondents indicate that they will travel.

Consumer plans

Intention to travel in the next six months

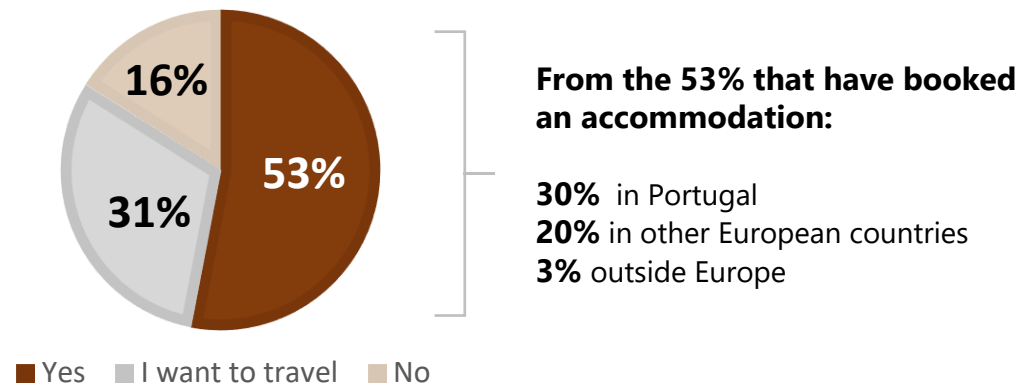


Figure 61: Consumer travel plans for the next six months Source: Primary data

- There are still many **restrictions** on movement and much uncertainty of lockdowns and rules that may change in a short period of time as the gradual return to the "new normal" will not be done at the same pace by all countries as there are countries that will have access to the vaccine and a much larger quantity of vaccines than others where recovery will be slower.

Source: McKinsey, WTTC, UNTWO, Primary data

... and many consumers will continue to choose to travel in their own country

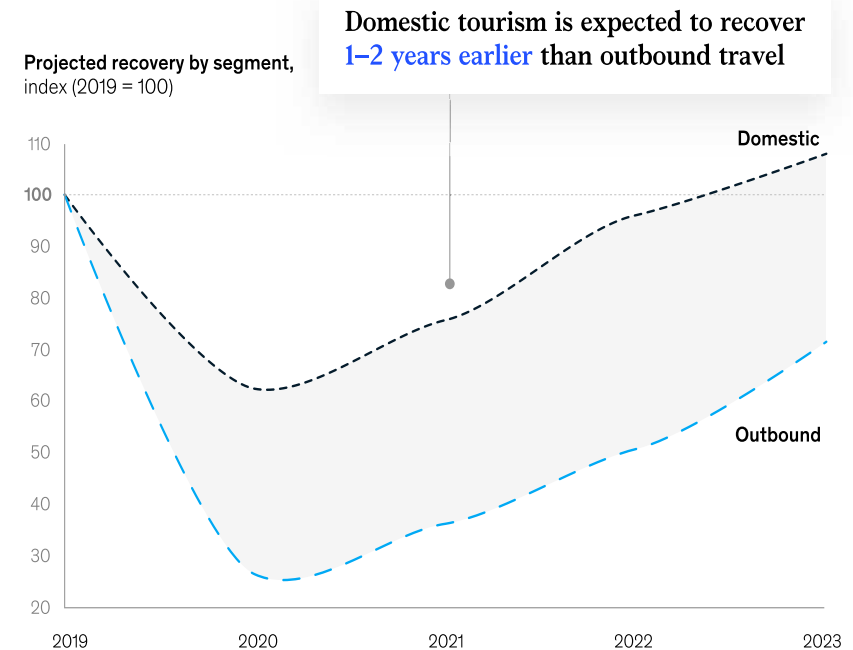


Figure 62: Recovery of domestic and outbound travel. Source: McKinsey

- WTTC indicates that domestic tourism will continue to be the **"key driver" for the recovery** of tourism figures, as it was during the pandemic and in another study, 83% of the inquiries indicate that domestic tourism will drive or only partially drive the recovery in their destination.

The technological transition that existed during the pandemic may result in a reduction in business travel in the “New Normal”

Covid-19 was a catalyst for the digital transformation of businesses

Covid-19 was a catalyst for the digital transformation of businesses...

Organization's current strategic posture towards technology shows that the investment in technology is now a matter of having a competitive advantage instead of a way of reducing costs

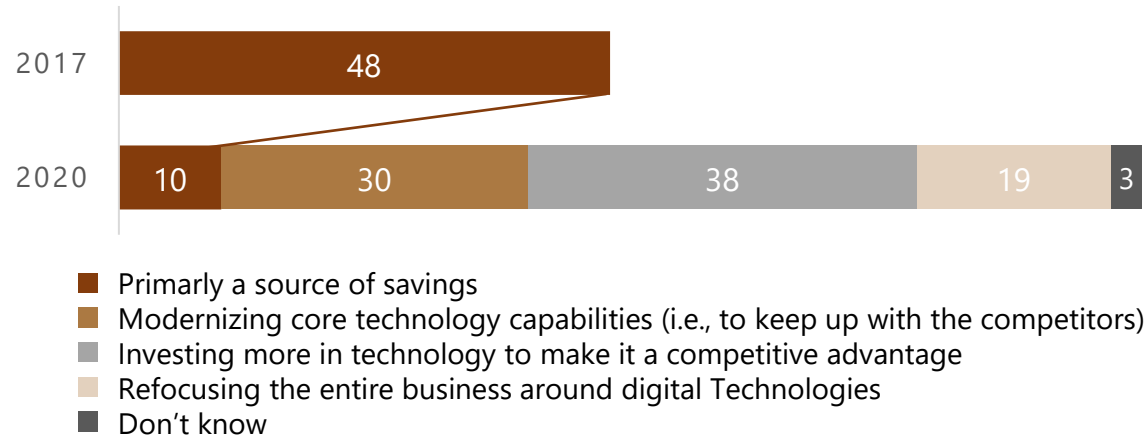


Figure 63: What is the main reason for companies to make technological investments . **Source:** McKinsey, 2020

- During the pandemic, many trips were cancelled due to restrictions imposed by many countries and because teleworking became the norm.
- What happened in the majority of the companies was a phenomenon of **digitisation in a fast way** which led to most activities involving physical contact going online, and even those who were more resistant to change had to adapt. Companies such as Microsoft have announced that **teleworking** will continue to be possible even after the pandemic.

Source: WTTC, McKinsey, Investopedia, Page

...and the technological transition that existed during the pandemic may result in a reduction in business travel in the “next normal”

- One of the main segments of travel is **business travel**, which in 2018 accounted for **21.4%** of total world travel. This segment includes **meetings, incentives, conferences, and events (MICE)**.

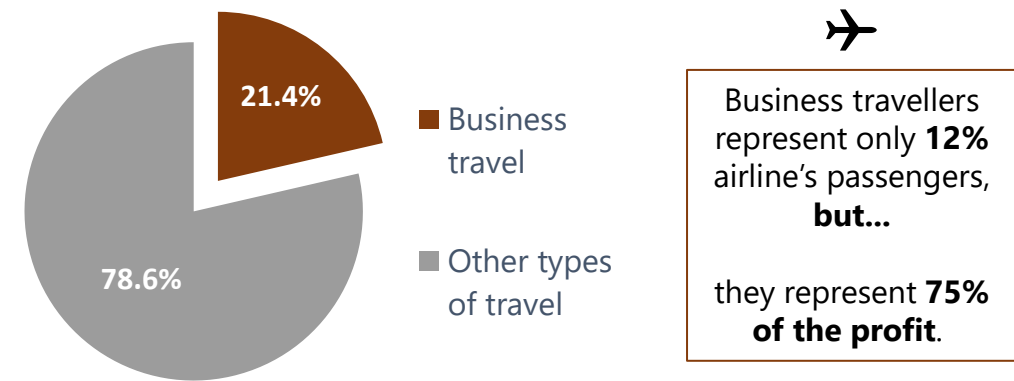


Figure 64: Business Travel **Source:**WTTC.

- Thus, the impact of this type of travel on the accommodation industry is significant and there are even accommodation specialising in this type of travel or others accommodations with spaces dedicated to MICE events. A drop in business travel has an impact in the **entire ecosystem** around Travel & Tourism industry.

Tourism is directly linked to three sustainable development goals

Sustainability is one of the main pillars of European Union policies in the next years

Sustainability is one of the main pillars of European Union policies in the next years

- Sustainability is one of the pillars of the European Union **budget for 2021-2027**, with measures included in the European Green Deal, 50 measures for Europe to become **carbon neutral by 2050**, making it the first continent that would achieve this. The deal includes areas such as transportation and agriculture in order to do a transition to a circular economy.

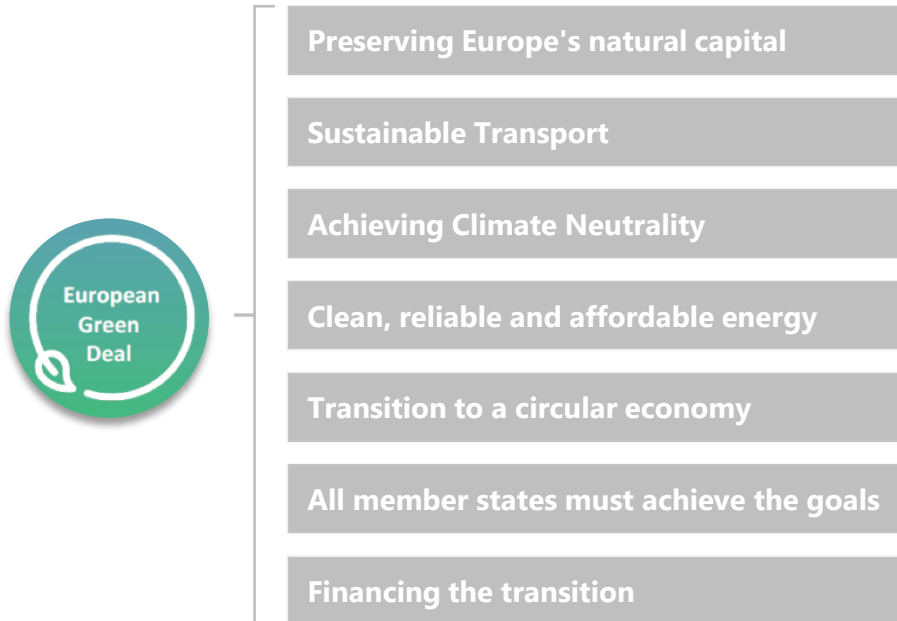


Figure 65: European Green Deal. **Source:** FACE

... and Tourism is directly linked to goal 8 (decent work and economic growth), 12 (responsible consumption and production) and 14 (life below water)

- Sustainable development goals** are seventeen goals that aim to combat the major problems facing the world, each of which has a goal to be met by 2030, the achievement of which requires cooperation at the international level so that such important goals can be achieved.
- Tourism** has a direct impact on three of the seventeen sustainable development goals, more specifically on the objective **8** (decent work and economic growth), **12** (responsible consumption and production) and **14** (life below water).



Goal 8	Millions of people lost their jobs, with tourism being one of the most affected sectors.
Goal 12	While several countries have been promoting sustainable consumption and production plans the global material footprint continues to grow.
Goal 14	Confinement in much of the world has had beneficial consequences for the environment yet acidification of the oceans threatens marine ecosystems and negatively affects many tourist destinations.

Figure 66: Challenges of the three sustainable development goals related to tourism in the coming years
Source: United Nations

Source: FACE, United Nations, Climate Action Network, Turismo de Portugal

The Portuguese strategy for the next years is to become a renowned sustainable destination

Structure, promotion, qualification and monitorization are the four axes of the Portuguese "Tourism + sustainable plan 2020-2023"

The Portuguese strategy for the next years is to become a renowned sustainable destination

- Sustainability is an issue that has gained greater prominence over recent years due to the growing need to respond to **climate change** that is compromising life on Earth for future generations and whose consequences are already visible today.
- Thus, although it has already been identified as a visible trend in tourism before Covid-19, it will remain one of the main topics in the coming years, and Portugal wants to take a role in this **shift towards a more sustainable tourism**.
- During the pandemic, the **"Tourism + sustainable plan 2020-2023"** initiative emerged with the aim of making Portugal a sustainable destination recognized worldwide and at the same time achieving these targets, meeting the targets set for 2027, in the **Tourism 2027 strategy**.



Source: Turismo de Portugal

The four axes of the Portuguese "Tourism + sustainable plan 2020-2023"



Structure

More sustainable supply



Promotion

Promote Portugal internationally as a sustainable destination



Qualification

Qualify Portuguese human resources working in the Travel & Tourism sector



Monitorization

Track if the metrics set are being achieved by the agents of the sector



Some Accommodations around the world are references in digital transformation and domestic tourism

Several hotels are global references in technological transformation practices and in strategies to target domestic tourists

Smart LYZ, China



Located in Chengdu, China, Smart LYZ was the first ever **fully automated hotel**.

The use of state-of-the-art technology includes a **robot** that guides guests to the room where they will be accommodated, the use of a mobile app that serves as a **key** to open the room door, the use of **facial recognition** and **contactless** check-in and check-out.



Nevotouchless



Nevotek is a Turkish company that provides **touchless solutions** to tourist accommodations.

Some of the hotels that adopted Nevotouchless offer the possibility to use the **guest's smartphone** to order room service, use it as a remote control for the room's television or adjust the temperature.

New Shohei Hotel, Japan



In order to combat the lack of tourists, this Japanese hotel, bet on a campaign to attract **domestic tourists**.

During weekdays it is given the possibility of spending a night in one of the hotel's single rooms without paying a monetary amount, but in exchange for **posting a photograph and mentioning the hotel in the social networks** in order to increase the hotel's visibility in a period when there were low occupancy rates.



Sheraton Cascais, Portugal



With a greater popularity or imposition of **teleworking**, Sheraton Cascais created a special package whose target audience are people working remotely and want to change their location after many days at home and take advantage of amenities provided in the hotel.

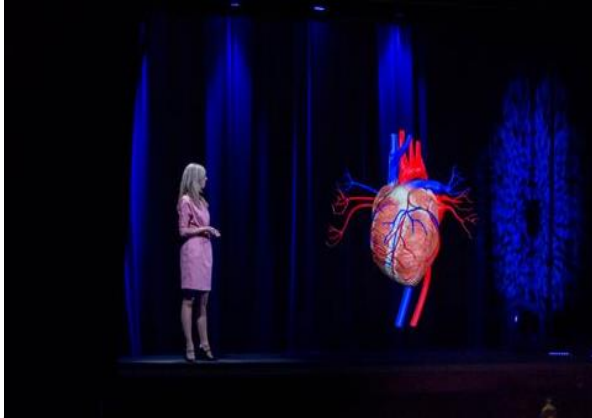
In this way, the hotel can attract **domestic tourists** to make up for the drop in international tourists.

Source: Wong, Nevotek, Real, Furutani, Travel and Tour World, Sirt

Best practices from accommodations around the world include the “bleisure” concept and positive ecological footprint

Several hotels are global references in business travel and sustainability practices

The NH Collection Berlin Mitte Friedrichstrasse, Germany



This German hotel is an example of best practice in the **business travel** category as it is possible to use cutting-edge technology as **holographic technology**, very useful for example in conferences where it is necessary and more engaging to present 3D images.

Besides the technological component, the **sustainable** component is also present in this hotel as guests have charging stations for electric cars.



Aparthotels Adagio



Aparthotels Adagio give the opportunity for those who wish to find a place to **work remotely** in privileged locations of several cities of the world.

These tourist apartments provide all the necessary conditions and can be used in the **medium-long term**, with the discount on the price increasing as the number of overnight stays increases. The guests can benefit from the “**bleisure**” concept, a trip where both business and leisure are included.

SVART, Norway



This hotel that will open its doors in 2022 in Norway will be the first hotel with a **positive ecological footprint**, which means it will produce more energy than the one it needs to use.

SVART also aims to be **self sufficient** in terms of food, since it aims to produce most of the food served in the hotel's four restaurants.

Papaya Playa Project, Mexico



This hotel located on a paradisiacal Mexican beach is an example of sustainability for **producing energy** through renewable sources such as solar energy, as well as the impact it has on the **local community**, such as the use of decoration made by local artists.

In addition to its focus on reducing its **environmental footprint**, the hotel also focuses on producing some of the food that is served to guests.



Source: Accor, Afar, Haan, Snøhetta, The Travel, The Travel Lab

The factors that have a higher impact on the recovery of international tourism are travel restrictions, Covid-19 propagation, low consumer confidence and poor economic environment

Building scenarios helps reducing the complexity of the analysis by providing tools to structure thinking, to pinpoint critical factors and to weight alternatives

Building scenarios helps reducing the complexity of the analysis by providing tools to structure thinking, to pinpoint critical factors and to weight alternatives



- There are multiple futures because no future can be pre-determined, predicted or influenced;
- Different futures can happen: the possible futures, the plausible futures and the most probable futures;
- The choices we make now will affect the future generations;
- Scenarios are not trying to predict the future.



- We learned this year that predictions can be very wrong;
- The impact on the T&T sector was very high because it is a sector where large gatherings and human interaction are essential, hygiene is of critical importance and free mobility of people is critical;
- However, there are alternatives, and we are not doomed;
- International cooperation, dialogue and leadership will be fundamental to tackle the Covid-19 pandemic.



- Tourism has the power to help the world recover and change it for better;
- Staying home today will allow us to travel tomorrow is the World Travel Organization's key message;
- The solidarity of Tourism and individual tourists can help contain the negative impact of Covid-19;
- In an atypical world, mankind must be patient and prepare to recover as fast and as best as possible.

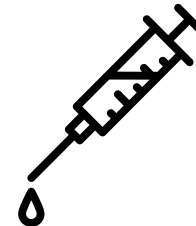
The factors that have a higher impact on the recovery of international tourism are travel restrictions, Covid-19 vaccine efficacy, low consumer confidence and poor economic environment



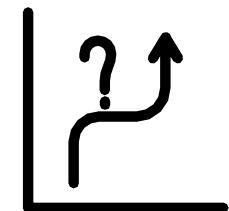
**International
Travel Restrictions**



**Confidence
Index**



**Vaccine
efficacy**



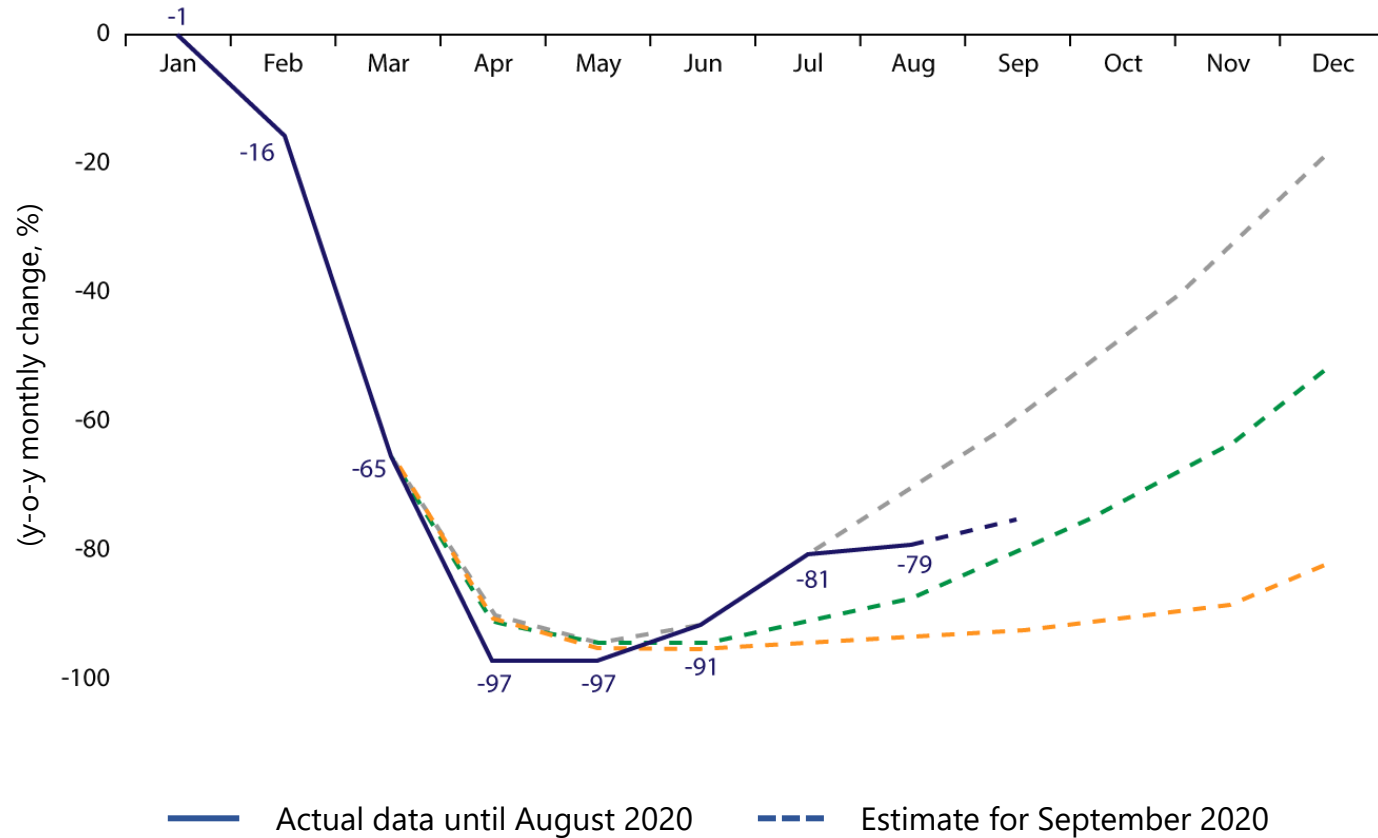
**World GDP
predictions**

Source: Germany Travel, UNWTO

The UNWTO estimates that International tourist arrivals for 2020 could drop between -58% and -70% compared with 2019

As of December, Europe is the region in the world with less travel restrictions. China and the USA still have their borders closed

The World Tourism Organization presented in May three different scenarios for International tourist arrivals recovery depending on the reopening of international borders. The data shows that international tourist arrivals could drop between -58% and -70% compared with 2019.



Forward-Looking Scenarios in May:

(Year-over-Year change, %)

- Scenario 1: -58%
- Scenario 2: -70%
- Scenario 3: -78%

Travel Restrictions overview of 2020:

- Most countries in the World had their borders closed in the end of March;
- International travel stopped almost 100% during April and May;
- In Europe and in other few destinations during June and July, people were allowed to travel however, a second wave of Covid-19 cases forced many countries to reintroduce quarantine and impose more restrictions after summer;
- In November, 152 destinations have softened travel restrictions while 59 destinations still had their borders closed;
- As of December 2020, Europe is the region with less travel restrictions. China and the USA still have their borders closed.

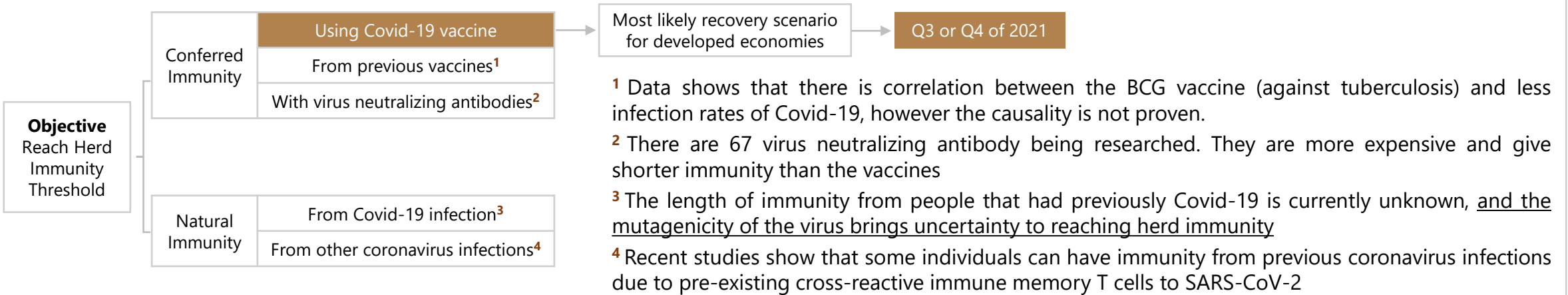
Figure 67: Three scenarios for International tourist arrivals in 2020 (YoY monthly change %). **Source:** UNWTO

Source: UNWTO, China-briefing, CDC

The most likely recovery scenario for developed economies to attain the herd immunity threshold is Q3 or Q4 of 2021

The herd immunity threshold is the fraction of the population that needs to be immune to the virus to stop the infection spread

The SARS-CoV-2 pandemic brought together the efforts of mankind to find a solution to stop the contamination. The first mRNA Covid-19 vaccine was developed and approved in record time. As of December 27th, there were 64 different vaccines being tested and 3 vaccines already approved for full usage⁽¹⁾.



Scenario	Efficacy	Coverage	Additional Natural Immunity	Assumptions	Herd Immunity Achieved
Pessimistic	50%	35%	45%	<ul style="list-style-type: none"> Efficacy at the minimum threshold level; Public reluctance to take the vaccine (similar rates to those of healthy adults not taking the flu vaccine). 	Not achieved
Middle ground	65%	50%	>25%	<ul style="list-style-type: none"> Coverage rate identical to the flu vaccine; 51% of the public is willing to take the vaccine during the first three months of commercialization. 	Q1 of 2023
Optimistic	80%	80%	5%	<ul style="list-style-type: none"> Efficacy is high like the most commonly administered vaccines (immunizations during childhood) 70% of the public is willing to take the vaccine when is approved and released 	Q3 of 2021
Pfizer-BioNTech Vaccine	95%*	56-60%**	-	-	?

*95% efficacy after administering the 2nd dose - **Acceptance between health professionals across 11 studies (03/12/20) (Appendix 6), from June to October 60% of respondents wanted the vaccine and 20% said they would refuse to take it

Source: FDA, McKinsey & Company, WHO, Nature Reviews (October 2020), CDC, the BMJ (December 2020), the New England Journal of Medicine (December 2020), MedRxiv (December 2020), NYTimes

(1) Check Appendix 5 for more details

The UNWTO experts expect there will be a rebound of International Tourism in 2021 during the third quarter and it will return to 2019 levels after 2022

Consumer confidence is felt differently across countries. In Portugal, uncertainty and pessimism about the economic recovery are high

The UNWTO experts expect there will be a rebound of International Tourism in 2021 during the third quarter and it will return to 2019 levels after 2022

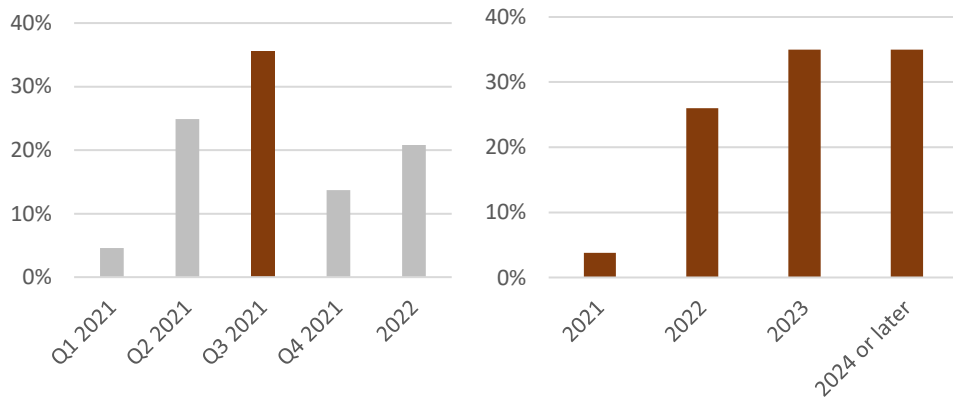


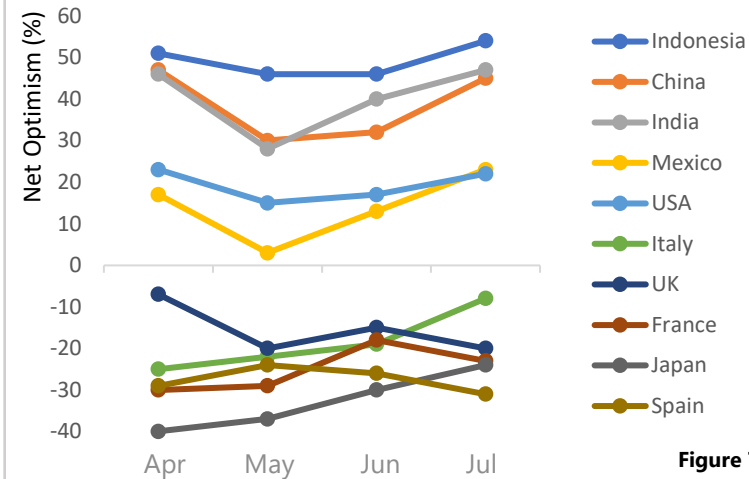
Figure 68: When will there be a rebound of international tourism? Source: UNWTO

Figure 69: When will international tourism return to pre-pandemic 2019 levels? Source: UNWTO

- The UNWTO confidence survey is answered by a group of experts that analyses global tourism performance and business sentiment every four months;
- Since the first publication of the UNWTO Confidence Index and Survey in April 2013 that the index was **never as low** as it was in October 2020;
- The expectations for consumer confidence improvement for the period September – December 2020 remain low;
- The UNWTO panel of experts expects a rebound of International Tourism in 2021, specially during the third quarter;
- The majority of the UNWTO panel of experts expects International tourism to return to pre-pandemic levels of 2019 only after 2022.

Source: UNWTO, McKinsey & Company

Consumer confidence is felt differently across countries. In Portugal, uncertainty and pessimism about the economic recovery are high



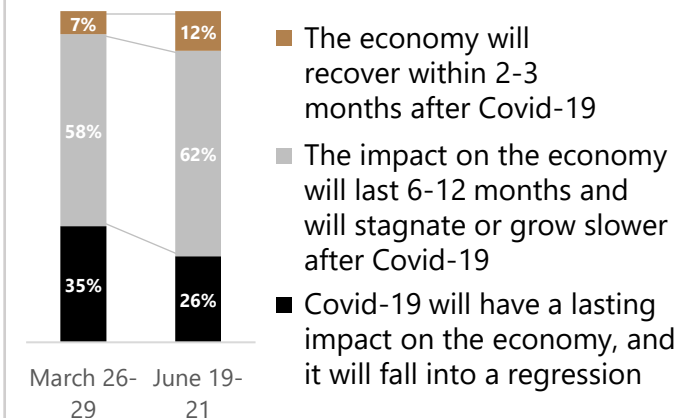
By September 2020:

The **more optimistic** Countries were:
Indonesia, India, China, Mexico & USA

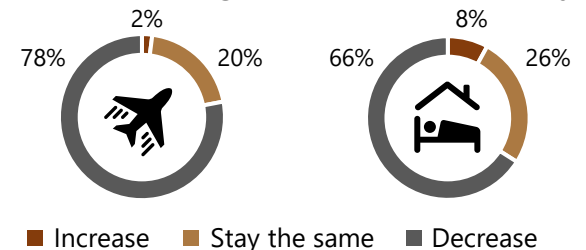
The **less optimistic** countries were:
Spain, Japan, France, UK & Italy

Note: Check Appendix 8 for detailed Covid-19 mortality rate

In Portugal, pessimism and uncertainty about the economic recovery are high



International Flights Hotels/Resorts Stays

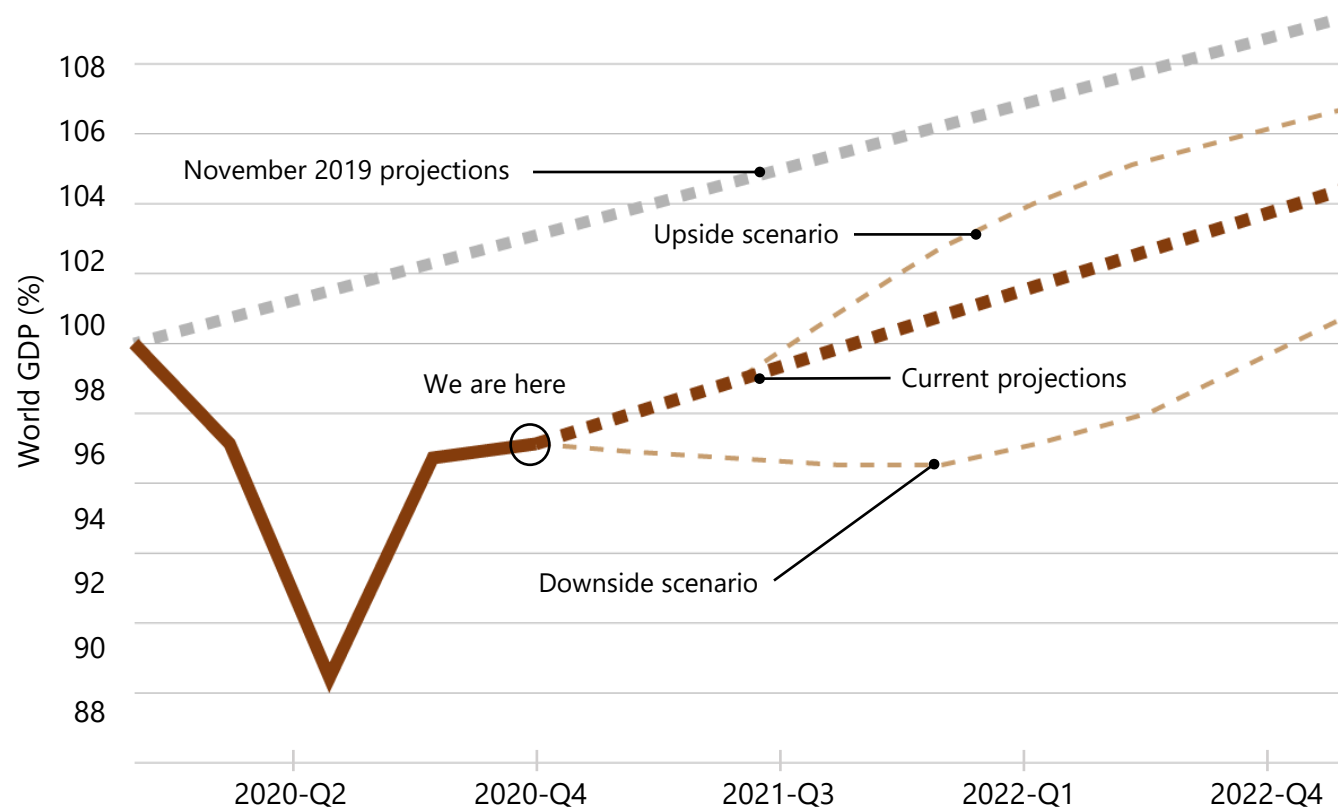


Figures 71 & 72: Confidence level in Portugal's economic recovery after Covid-19 (% of respondents) and Expected spending per category (% of respondents). Source: McKinsey & Company

OECD predicts an upside scenario for the Global GDP recover 4.2% by 2021 and a downside scenario where GDP could fall 5%

The rollout of the vaccine in the end of 2020 is increasing the chances of a faster economic recovery but the path will be long and strenuous

As of December 2020, the global GDP fell by 4.2% compared to the last quarter of 2019. The economic recovery will depend on multiple factors such as health policies, government support, vaccine efficacy, consumer confidence and ability to contain the virus. The recovery will be faster in the Asian countries.



Note: the World GDP is indexed at the level of 2019-Q4 which is equal to 100

Figure 73: World GDP projections by OECD (index=100 in 2019-Q4). **Source:** OECD

The most recent data from OECD

As of December 2020, the global GDP fell by 4.2% compared to the beginning of the year.

The difference from the November 2019's projections was around -6%.

By the Q3 of 2020, the Global DGP fell by 10%.

Upside Scenario

Less mobility restrictions, the rollout of Covid-19 vaccines in the end of 2020, strong health policies and government support are expected to raise global GDP by 4.2% in 2021.

The GDP recovery can be higher depending on how effective the vaccine is, how consumer confidence will grow and the degree of effectiveness of governments' fiscal policies

Downside Scenario

On the other side, if the vaccination campaign is delayed or its efficacy falls short of the expected and the virus is not contained, leading to new infection outbreaks, the Global GDP could fall by 5%



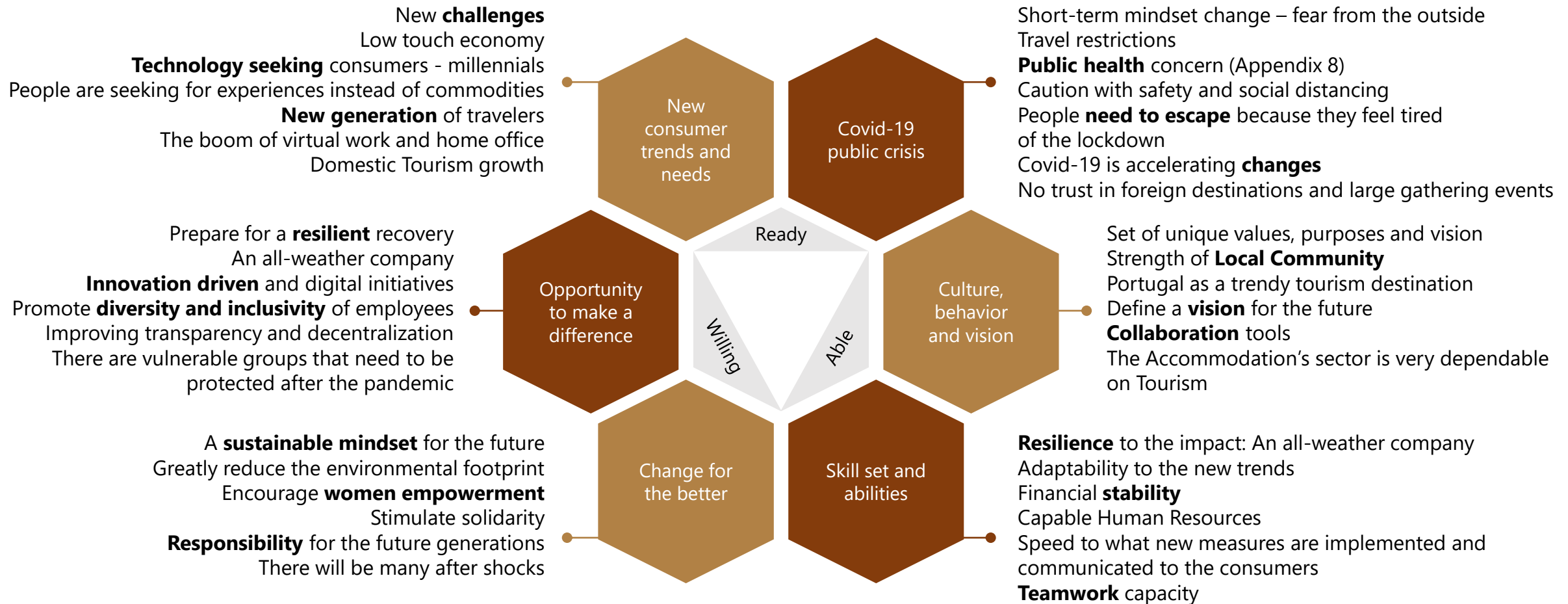
In Portugal, the **GDP** is expected to **fall by 8.4%**, recovering 1.7% in 2021 and 1.9% in 2022.

The unemployment rate will **grow up to 10%** in 2021 and the **public debt will reach 139%** of the GDP in 2022 (Appendix 7)

Facing the challenges this crisis brought, the Accommodations' managers in Portugal should be Ready, Willing and Able to adapt to the "New Normal"

This crisis can be a turning point to find solutions for a recovery more sturdy, sustainable, resilient, inclusive and friendly to the environment.

The Portuguese Accommodation managers are facing many new challenges never seen before. Their *status quo* is no more. This crisis can be a turning point to find solutions for a recovery more sturdy, sustainable, resilient, inclusive, friendly to the environment, that promotes equality, prosperity, diversity, creativity and financial stability.

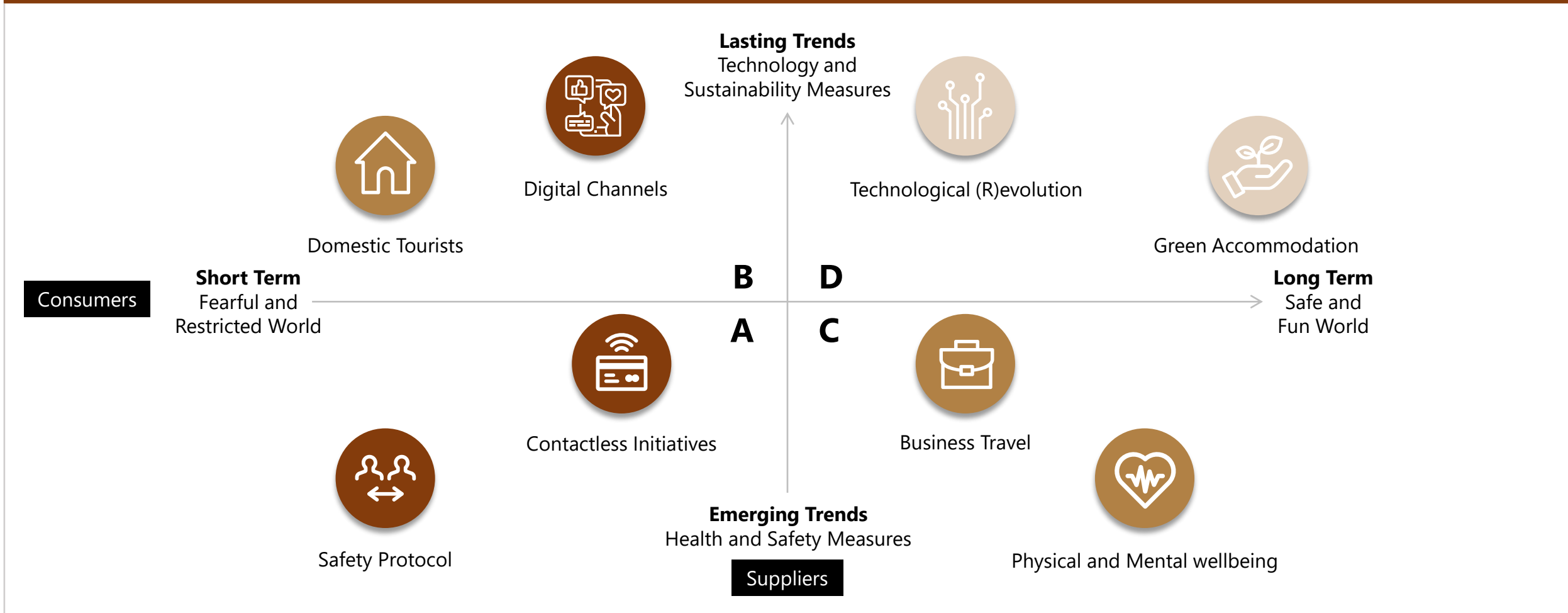


Source: OECD, Germany Travel

The recommendations for the Accommodation's sector are divided into two perspectives: consumers and suppliers

The short-term recommendations take into account the current Covid-19 restrictions while the long-term ones consider a new "safe but fun" travel behavior

The short-term recommendations take into account the current Covid-19 restrictions while the long-term ones consider a new "safe but fun" travel behavior. The Emerging Trends have an emphasis on safety and health, while the Lasting Trends are based on ways of creating new experiences and improving current ones with technology.



In the gradual return to the “New Normal” health and safety measures remain the number one priority

Trust building, social distancing, “low touch” options and contactless payments are some of the trends that will remain in a fearful and restricted world

Fearful and Restricted World - Health and Safety Measures



Safety Protocol

The virus transmission can occur at more than 2 meters if there is direct air flow carrying the particles. **Wearing masks** and keeping **physical distance** from other people reduces greatly the risk of Covid-19 infection (CDC, 2020).

- Need to create **trust and sense of security**;
- Establish safety measures against Covid-19 and implement a **protocol of action** against potential contamination inside the accommodation and apply for the “**Clean and Safe**” seal;
- Clearly communicate that you are following all the Covid-19 **science-based** prevention procedures;
- Indoor spaces, restaurants and other common areas should have **proper ventilation** because the SARS-CoV-2 particles spread more easily indoors than outdoors (Appendix 9);
- Remember your guests to keep **social distancing** in between them;
- Enforce the **use of masks** indoors while outside of the room to prevent the virus transmission (Appendix 10) and provide **free disposable masks**;
- Use **trusted community leaders** such as public health professionals, church leaders or specialized medical staff to communicate Covid-19 prevention measures to increase their coverage and adoption rates (Appendix 11);
- Expect shorter and weekend trips.

Feasibility of implementation

Rural Tourism	3 stars Hotel	Inn
High	Medium	Low



Contactless Initiatives

“COVID-19 economy has caused the contactless market size to be **20% larger** than what it would have been if the pandemic did not happen.” (Deloitte, 2020).

- Travelers want to pay for their stay in the same way as they pay for their Uber, therefore offer of “**low touch**” **options** is a priority;
- In 2003, SARS epidemic which has most severely affected China, was the launch pad for **digital payments** in that country, just as **contactless payments** will become part of the “New Normal”;
- Enact the usage of the **QR code**;
- Use technologies such as **voice activated control** and **facial recognition**;
- The adoption of **5G technology** will bring several advantages both for the **suppliers** as for the **travelers** such as: greater internet speed, lower latency, bigger number of connected devices and network slicing (ability to implement virtual networks);
- Use innovative solutions such as Lynx that allows guests to use their own **mobile phone as a key** to enter the room;
- Create a **mobile application** for the guests dedicated to room service, reservations for the restaurant, gym or jacuzzi/saunas.

Feasibility of implementation

Hotel	Rural Tourism	Tourist Village
High	Medium	Low

Source: Booking, Jkms, CDC, Taylor & Francis Online, Germany Travel, IOT Solutions World Congress, Deloitte



Domestic Tourism will be an important driver for the recovery of Portuguese Travel & Tourism sector

The new generation of travelers are more exposed to digital marketing and the presence of the Accommodation in Online Travel Agencies is a must

Fearful and Restricted World - Technology and Sustainability Measures



Digital Channels

20% of the Portuguese suppliers surveyed want to **invest more in digital marketing** as a strategy after Covid-19 (Survey).

- Adapt to the new generation of travelers wants - **millennials** use more social media and are, consequently, more exposed to this kind of marketing;
- Ensure that **flexible cancellation and safety policies** are clearly communicated on all channels;
- Communicate that the accommodation is **open again** in case it was closed due to the pandemic;
- Make sure that in addition to attracting new guests, **bring back** also those who have cancelled their stay because 40% intend to rebook a trip that they had to cancel;
- Implement a short-term strategy to attract more guests by focusing digital marketing on **local people** instead of internationals;
- Highlight and implement more leisure activities such as micro adventures and new experiences;
- Implement community outreach programs through tourism business operators;
- Be present in **Online Travel Agencies**.

Feasibility of implementation

Local Accommodation	3 stars Hotel	Apartment Hotel
High	Medium	Low



Domestic Tourists

Countries have been trying to find incentives to encourage people to **explore their own countries** which has emerged a new trend in tourism: "Staycation" (Travel Daily News, 2020).

- Portuguese people are looking for new experiences while **discovering their own** country;
- When trying to escape from cities, people tend to opt for quiet places in a nature environment just a few hours away drive;
- Focus on the **local community** by using target marketing to identify the needs and attract the locals to fulfill their traveling needs;
- Increase the percentage of products sold that are **produced locally**;
- Increase the number of partnerships with restaurants that serve **local dishes** and provide regional handicrafts and products;
- By offering discounts and local perks to guests, you can **establish long-term relationships** with your guests, give them a reason to return and be the focus of your community;
- It is important to be aware of **local attractions, experiences and events** in order to cross promote them over the course of the year to engage new guests and make the old ones return;
- People will start looking for destinations that **resemble more** their home countries: Spanish tourists will nevertheless continue to be a target market.

Feasibility of implementation

Local Accommodation	Apartment Hotel	1 or 2 stars Hotel
High	Medium	Low

Source: NextGuest, KPMG, Revfine, North Central Florida Media, Travel Daily News.



Business Travel will have a gradual recovery characterized by the geographical proximity, interactivity and sector

Physical and mental wellbeing is no longer just a trend, it is a lifestyle already pursued by the younger generations that is here to stay

Safe and Fun World – Health and Safety Measures



Business Travel

Global Business Travel Association predicts that the business travel industry will suffer a **crash of 820.7 billion USD**. Teleworking is very likely to continue after the pandemic, but business travel will gradually recover (Zoho, BBC, 2020).

- Understand the new **remote flexible working** behavior;
- Accommodations can adapt certain areas for business travelers that need to work using **videoconference**;
- The areas of more economic activity in Portugal will be the first to welcome back Portuguese business travelers due to **regional travel**;
- Target business travelers that must keep close human interaction to conclude **essential business operations**, such as in-person sales, construction workers or health workers and local industries bound to resume business travel in the medium-term such as real estate, tech or finance;
- Provide **flexible cancelation policies** to improve companies' confidence when booking trips for their employees;
- Partner with **local companies** to receive their employees for remote working or for business events by marketing "safe of Covid-19" conditions;
- **Rent available rooms** to companies for a short period of time so that they can use the space for offices and workspaces, meetings, exhibitions and other cultural events, showrooms or education and training;
- Organize social events to improve brand image and create awareness.

Feasibility of implementation

5 or 4 stars Hotel	3 stars Hotel	Rural Tourism
High	Medium	Low



Physical and Mental wellbeing

There is a desire to enjoy more of our **natural resources**. The demand for hiking (94%), clean air (50%), nature (44%) and relaxation (33%) on **Booking.com** have increased since the start of the pandemic.

- Research shows that more than two-thirds of travelers want to appreciate **more simple experiences** such as spending time outdoors or with the family while on vacations. More than half will seek out more rural, off-the-beaten-track experiences;
- Invest in places where it is possible to implement **outdoor activities**;
- Throw open space events and promote outdoor activities to attract more guests;
- Create events of **online** fitness, yoga, online courses, mindfulness and increase the number of guides for individual or small group excursions;
- Establish partnerships with strong influencers in the Physical and Mental wellbeing world to **create awareness**;
- Communicate the proper conditions that the accommodation offers in order to attract people that **seek stress-free time**;
- Use KPIs that are important to analyze **visitor fulfillment**, community well-being, physical integrity, biological diversity, environmental purity, among others.

Feasibility of implementation

Rural Tourism	Tourist Village	Apartment Hotel
High	Medium	Low

Source: Zoho, BBC, Hotel Business, Booking.



In a secure but fun world, we will see a technological evolution that will be accompanied by a sustainable transition

Security measures will no longer be a priority but issues such as sustainability will remain central

Safe and Fun World – Technology and Sustainability Measures



Technological (R)evolution

Hotels that offer a virtual tour online saw an increase of **135%** on online revenues (PwC, 2019).

- Accommodations already use **chatbots**, with an increasing capacity to customize the service and adopt human characteristics;
- Implementation of indoor **robots** to perform tasks such as room delivery or mechanical arms to retrieve and safe luggage or even to cook omelets to free up human resources from the Accommodation to perform other tasks and boost productivity;
- In the era of **big data**, the analysis of customer data is essential to offer greater customisation and greater satisfaction. The use of this data can be very valuable as it allows to create personas to improve the understanding of tourists and what they are looking for in the accommodation;
- Utilization of **virtual reality** to provide customers the opportunity to do a virtual tour through the accommodation beforehand;
- Provide **visible temperatures** of guides and staff;
- Create smart rooms with built-in control devices that incorporate personalized **APIs** (Application Programming Interface) for every guest;
- Although **a large initial investment** is required, medium to long-term cost reductions pay off in many accommodations.

Feasibility of implementation

5 or 4 stars Hotel	Rural Tourism	Inn
High	Medium	Low



Green Accommodation

73% of global consumers expressed a will to definitely or probably change their consumption habits to reduce the environmental impact (Nielsen, 2019).

- Sustainability **certifications** such as LEED certification make tourist accommodations a reference in the market and more visible to consumers;
- Tourist accommodations should take advantage of **funds** and government support programs for sustainability to make their buildings eco-friendly;
- Many tourist accommodations depend on **natural landscapes** which are threatened by climate change and therefore put the future of certain tourist destinations at risk;
- Booking.com reveled a survey for travel trends in 2021 where 69% of tourists expect the travel industry to offer more **sustainable travel options**;
- Reducing the **ecological footprint** should be a priority for Accommodations that can be achieved by implementing measures to reduce water, energy, improve waste management with active recycling and treat sewage waters;
- Report any type of **pollution** happening in the area and test for water and air quality;
- Provide **environmentally friendly transport**.

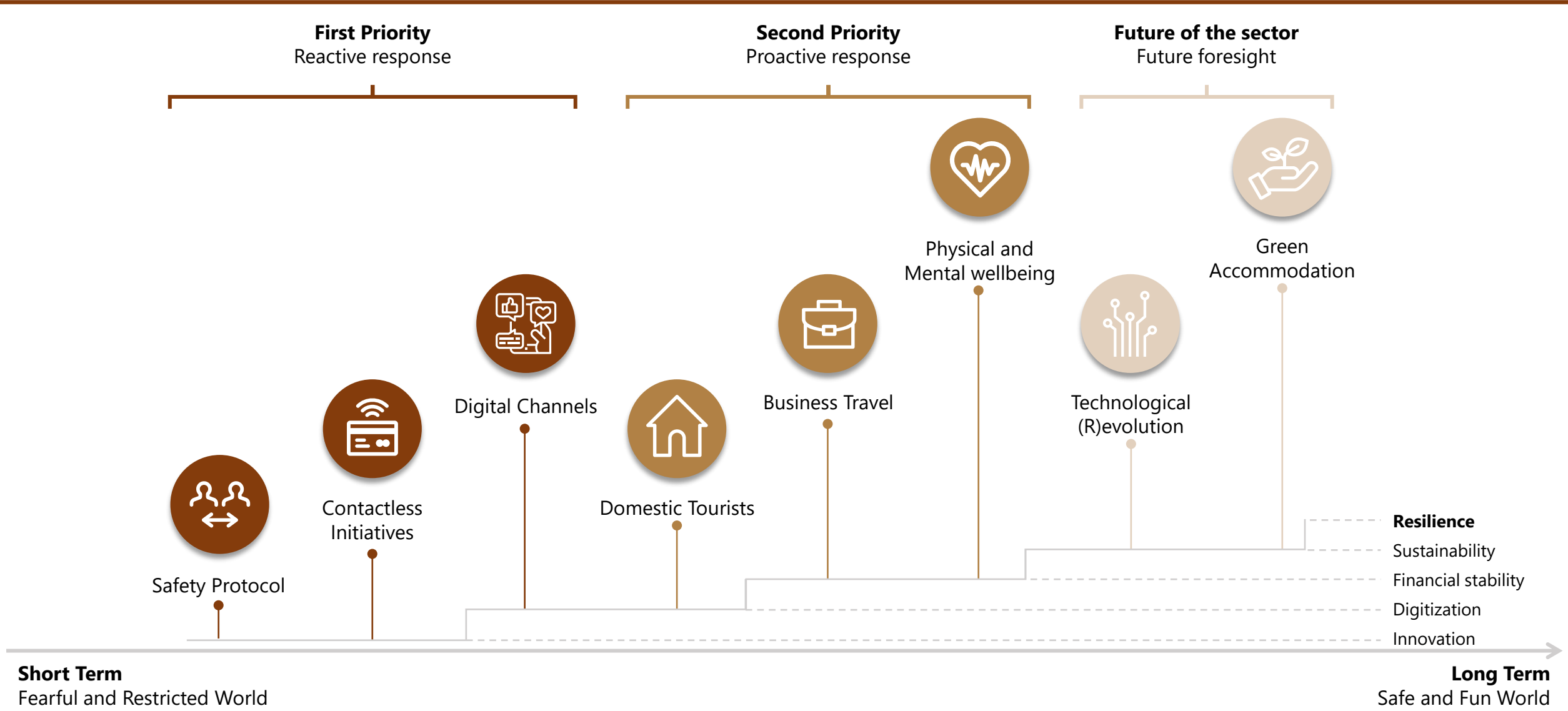
Feasibility of implementation

Rural Tourism	Apartment Hotel	1 or 2 stars Hotel
High	Medium	Low

Source: Nielsen, PwC, Booking.



Shifting to the next normal is a tough process that only the most resilient Accommodations will be able to do



Which story did we tell?

What are the trends in Travel & Tourism that are emerging during the Covid-19 pandemic and ...

What was the context before Covid-19?

Context: Travel & Tourism is one of the sectors with the greatest impact worldwide.

The Portuguese tourist Accommodations welcome an increasing amount of guests every year having registered a record number of guests in 2019.

Diagnosis: The evolution of the main tourism indicators in Portugal over recent years has been extremely positive.

At the same time the dependence of the economy on the Travel & Tourism sector is very high.

Transforming Trends



Technology



Sustainability



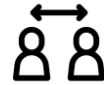
Wellness



Emerging Trends



Using QR code to access information



Physical barriers



Mandatory use of mask & its availability for guests



How will the "New Normal" be like?

Forecast: The "New Normal" will be characterized by "low touch" options, higher uncertainty, less business travel and greater environmental concern.

Scenarios are important tools to increase clarity and structure thinking.

Diagnosis: The recommendations will help the Accommodations to be more technologically apt, innovative and friendly to the environment.

Accommodations need to build resilience to meet the sector's future trends and the consumer changing needs.

Lasting Trends



Low touch economy



Domestic Tourism



Less Business Travel



Sustainable Tourism

... How can the Portuguese tourism Accommodation's ecosystem adapt to the changes and become competitive in the post Covid-19 world?

Recommendations

Which recommendations should have the highest priority?

In which phase of the crisis the measures need to be addressed?

In which factors your accommodation should focus on?



Now (1st Priority)

Reactive response to the most immediate needs of the consumer

- Health and safety measures
- "Low touch" options
- Digital marketing



Next (2nd Priority)

Proactive response to deal with the many after-shock scenarios

- Local community
- Remote flexible work
- Outdoor activities



Beyond (Future of the sector)

Foresight to what the future of the ecosystem will be like

- Productivity
- Sustainable travel options
- Ecological footprint

Key Takeaways – Path Forward: The “New Normal”

5. Lasting Trends



“Low touch” economy
Accelerated by Covid-19.



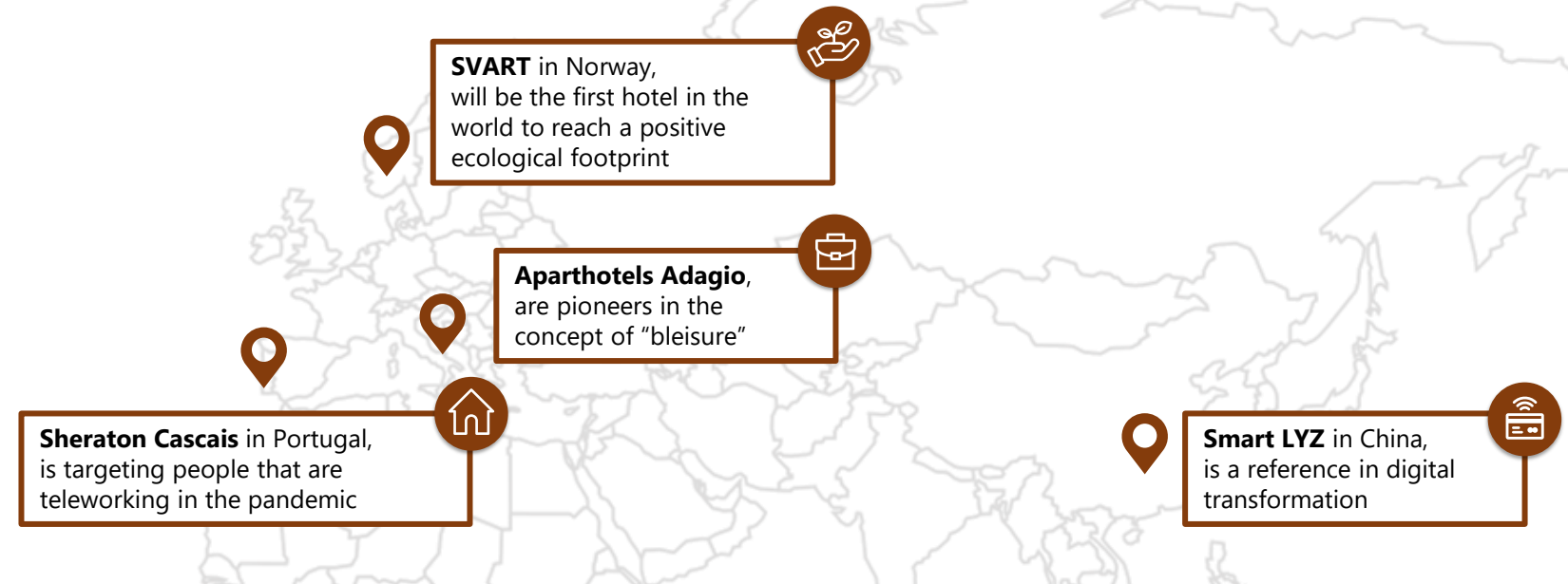
Domestic Tourism
People will continue to travel specially in their own countries.



Less Business Travel
Remote Communication will reduce Business travel.



Sustainable Tourism
Tourism is directly linked to 3 SDGs.



6. Planning ahead



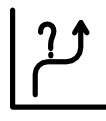
-58% to -70%
International tourist arrivals
(2020 predictions)



Q3 or Q4 of 2021
to reach Herd Immunity
(Vaccine efficacy)



in 2021
Rebound of International Tourism
after 2022
Return to pre-pandemic levels
(**Confidence Index**)



+ 4.2%
Upside Scenario
- 5%
Downside Scenario
(**World GDP prescriptions**)



RWB Framework Adaptation to the “New Normal”

- Health and Safety measures
- “Low Touch” options
- Attract Domestic tourists
- Less Business Travelers
- Technological evolution

The implementation of the right measures today will help Accommodations to ensure sustainability and competitiveness in the future

Short Term

Fearful and Restricted World

Reactive
response

Long Term

Safe and Fun World

Proactive
response

Future
foresight



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Appendices



Overall Key Takeaways

Module	Section	Key Takeaways
Context Analysis: The “Old Normal”	1. Travel & Tourism: Overview	<ul style="list-style-type: none"> Travel & Tourism is the fifth industry with the highest total GDP contribution and the fourth in terms of total employment contribution as of 2018 Travel & Tourism in Portugal is a strategic sector to the social development of the country, where many jobs are being created Tourists choose Portugal because of the hospitality, culture, beaches, climate, gastronomy and safety
	2. Accommodation's ecosystem analysis	<ul style="list-style-type: none"> During the last 5 years there has been an increase in the number of guests in Portuguese tourist Accommodations from the main markets that export tourists to Portugal Portuguese travel by car when they travel in their own country and by plane when they travel abroad. Online travel agencies is the most important channel New trends in tourism have emerged related to technology, sustainability and welfare.
Covid-19: The Situation Now	3. The virus' impact	<ul style="list-style-type: none"> Covid-19 pandemic is becoming the worst crisis for international Travel & Tourism to date. The reason behind the Portuguese Tourism Revenues' crash was the lack of foreign tourists. RevPAR suffered an abrupt break due to the pandemic.
	4. Emerging trends	<ul style="list-style-type: none"> Most of the respondents travelled for leisure and Rural Tourism presented the greatest occupancy rates. Safety measures implemented by establishments influenced the choice of consumers in the channel, type of accommodation and means of transport. Governmental support has been crucial to the sector's survival.
Path Forward: The “New Normal”	5. Lasting trends	<ul style="list-style-type: none"> The lasting trends are low-touch economy, domestic tourism, less business travel and sustainable tourism The pandemic has been a catalyst for change and acceleration of the digital transformation Some Accommodations around the world are references in digital transformation, adapted to the new business travelers, implemented the “bleisure” concept or have a positive ecological footprint
	6. Scenario Forecasting	<ul style="list-style-type: none"> The factors that will lead the recovery of international tourism are the lifting of travel restrictions, control of the Covid-19 propagation, increase in consumer confidence and improved economic environment “Reinvention” is what many Portuguese tourist Accommodations will have to do to survive The recommendations should be done based on the most immediate consumer needs to ensure sustainability and competitiveness in the future

Appendix 1

Portugal

12th / 140



Travel & Tourism Competitiveness Index 2019 edition

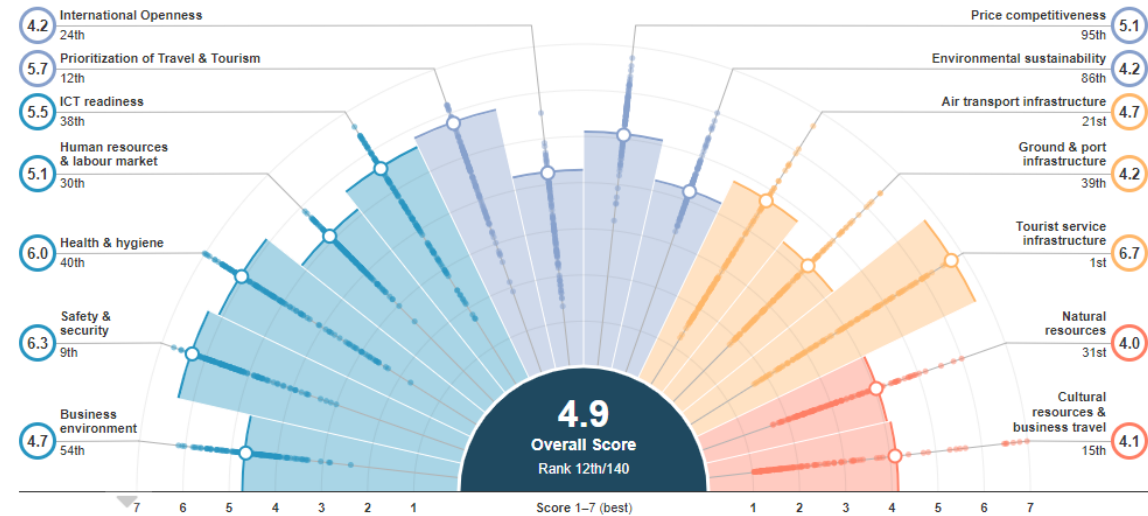
Key Indicators

Sources: World Tourism Organization (UNWTO) and World Travel and Tourism Council (WTTC)

International tourist arrivals	21,200,000	i	T&T industry Share of GDP % GDP	7.1	i
International tourism inbound receipts	US \$17,118.7 million	i	T&T industry employment	389,200 jobs	i
Average receipts per arrival	US \$499.5	i	% of total	8.1%	
T&T industry GDP	US \$16,905.0 million	i	T&T industry Share of Employment % total employment	8.1	i
% of total	7.1%				

Portugal Performance Overview

Key  Score Compare with  No comparator

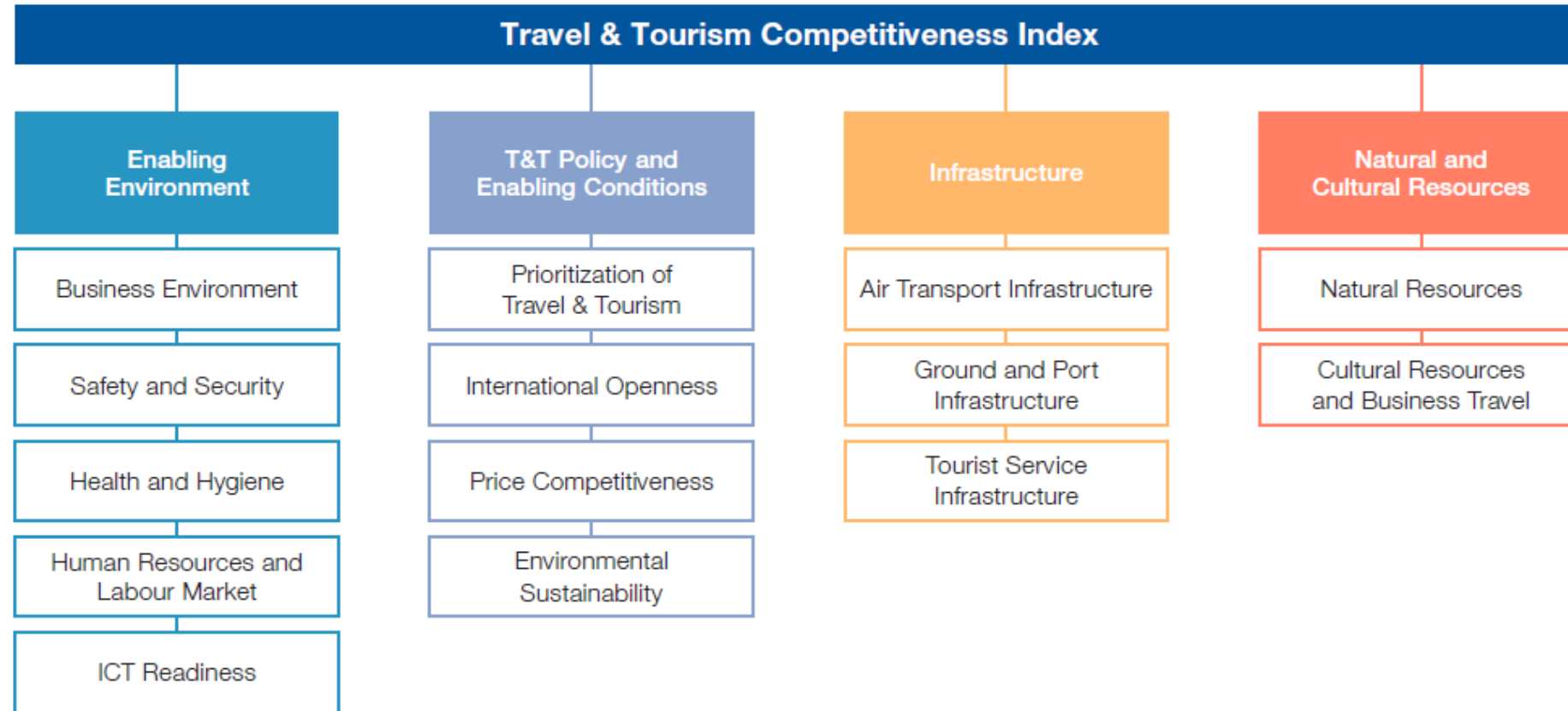


Portugal's profile in the Travel & Tourism Competitiveness Index 2019 version

World Economic Forum, The Travel and Tourism Competitiveness Index 2019

Appendix 2

The T&T Competitiveness Index 2019 framework



T&T Competitiveness Index framework 2019

World Economic Forum, The Travel and Tourism Competitiveness Index 2019

Appendix 3

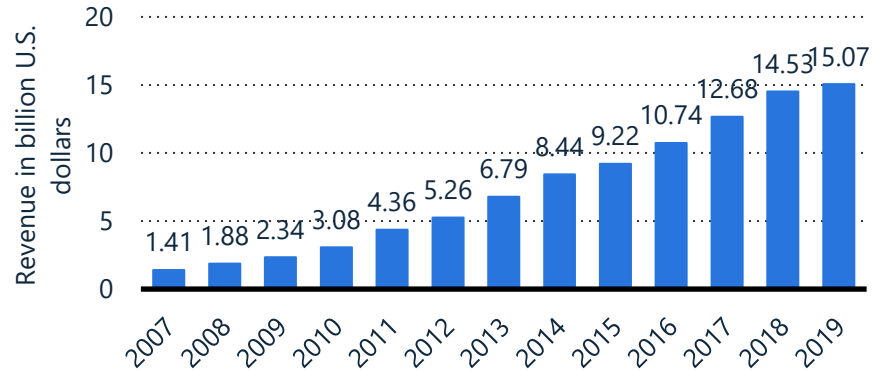
	Ireland	Spain	Italy	U.S.A.	Brazil	Germany	France	UK	Spain
Number of guests 2019	413 211	594 659	713 065	1 190 204	1 270 221	1 520 900	1 610 153	2 147 324	2 278 029
Variation guests (2018-2019)	+15.6%	-2.5%	+7.1%	+21.2%	+15.1%	-5.1%	-1.9%	+5.1%	+10.1%
Number of overnight stays 2019	1 792 782	2 356 990	1 684 225	2 685 595	2 931 477	5 874 250	4 552 730	9 374 527	5 225 654
Variation overnight stays (2018-2019)	+9.5%	-7.6%	+5.2%	+19.7%	+13.3%	-8.9%	-3.2%	+0.5%	+7.1%
Tourism receipts (€)2019	702 860	707 900	472 370	1 292 750	734 900	1 983 310	2 599 570	3 285 790	1 948 980
Variation tourism receipts (2018-2019)	+13.2%	-3.7%	+12.3%	+28.9%	+10.1%	+2%	+3.5%	+7.9%	+14%

Guests, overnight stays and tourism receipts by market **Source:TravelBI** .

Appendix 4

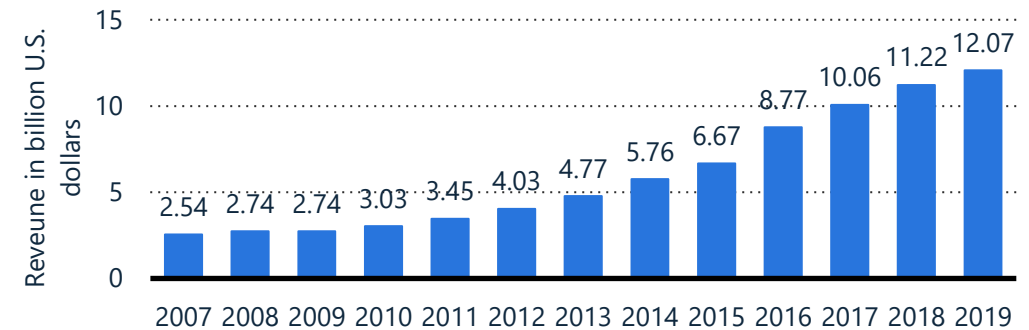
Revenue of Booking worldwide from 2007 to 2019 (in billion U.S. dollars)

Revenue of Booking Holdings 2007-2019



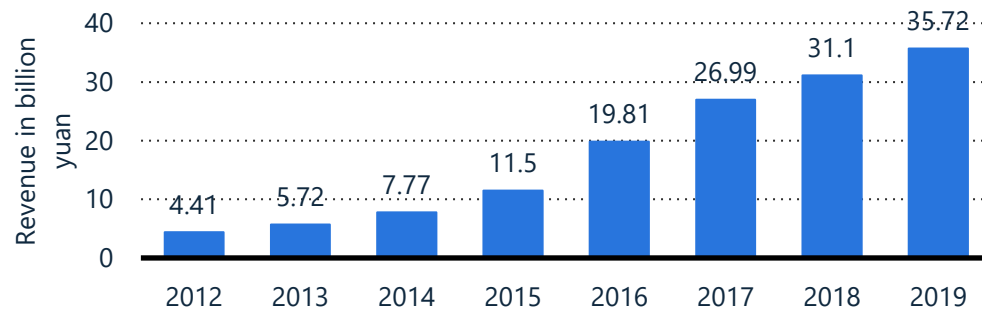
Revenue of Expedia Inc. worldwide from 2007 to 2019 (in billion U.S. dollars)

Revenue of Expedia Inc. worldwide 2007-2019



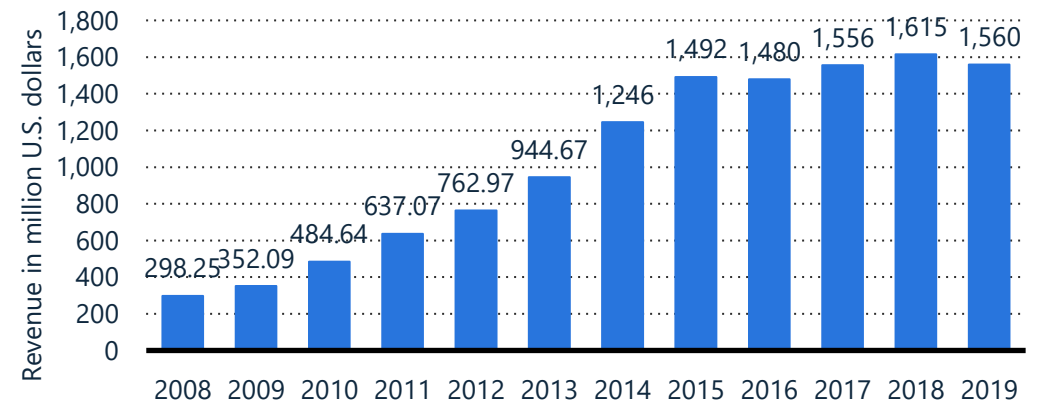
Total revenue of Ctrip.com International in China from 2012 to 2019 (in billion yuan)

Total revenue of Ctrip.com International 2012-2019



Revenue of TripAdvisor worldwide from 2008 to 2019 (in million U.S. dollars)

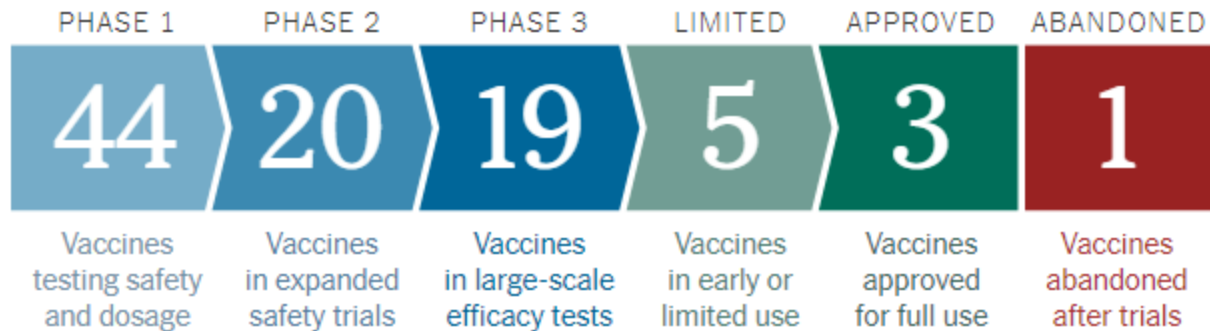
TripAdvisor's global revenue 2008-2019



Appendix 5

Coronavirus Vaccine Tracker

By Carl Zimmer, Jonathan Corum and Sui-Lee Wee Updated Dec. 27, 2020



Leading vaccines

Developer	Type	Phase	Status
Pfizer-BioNTech	mRNA	2 3	Approved in Canada and other countries. Emergency use in U.S. and other countries.
Moderna	mRNA	3	Approved in Canada. Emergency use in U.S.
Gamaleya	Adenovirus	3	Early use in Russia. Emergency use in Belarus, Argentina.
CanSino	Adenovirus	3	Limited use in China.
Johnson & Johnson	Adenovirus	3	
Oxford-AstraZeneca	Adenovirus	2 3	
Vector Institute	Protein	3	Early use in Russia.
Novavax	Protein	3	
Sinovac	Inactivated	3	Limited use in China.
Sinopharm-Beijing	Inactivated	3	Approved in U.A.E., Bahrain. Limited use in China.
Sinopharm-Wuhan	Inactivated	3	Limited use in China, U.A.E.

Covid-19 Vaccine development tracker and Leading Vaccines

<https://www.nytimes.com/interactive/2020/science/coronavirus-vaccine-tracker.html>

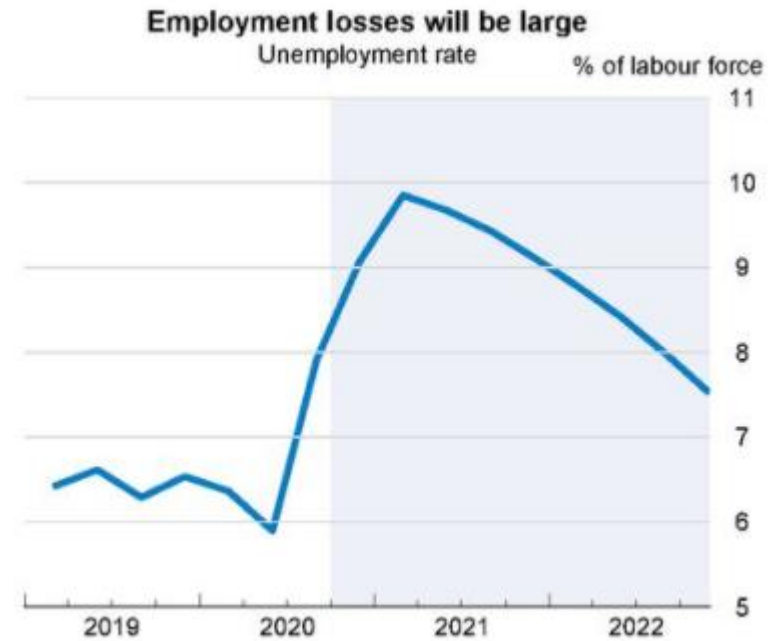
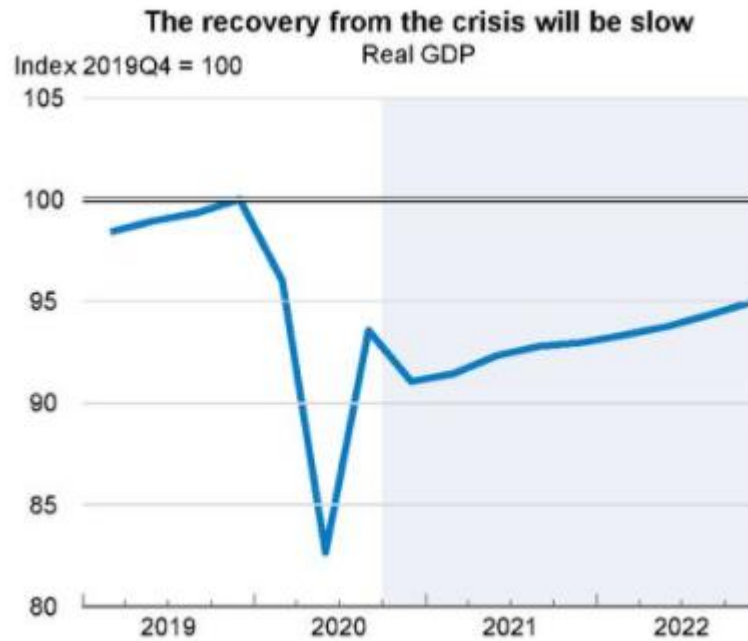
Appendix 6



Number of people that intend to take the vaccine by country and time

<https://www.medrxiv.org/content/10.1101/2020.12.01.20241729v1.full>

Appendix 7



Economic forecast for Portugal until end of 2022 by OECD

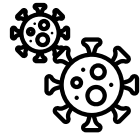
https://www.keepeek.com//Digital-Asset-Management/oecd/economics/oecd-economic-outlook/volume-2020/issue-2_39a88ab1-en#page232

Appendix 8

- Mortality rates stabilized during summer amidst and increase of new cases;
- The number of deaths has been increasing in mid September, reaching a **new high** of approximately **80 thousand deaths** reported on the week beginning in 30th of November.

IFR = 1.4%

Infection Fatality Rate
Deaths / Cases

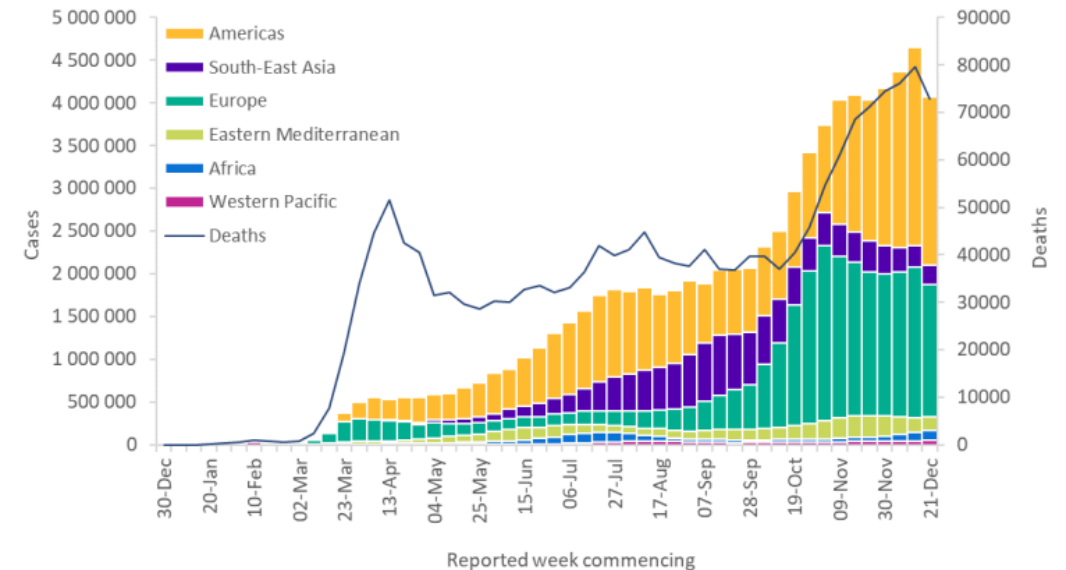


CMR = 0.28%

Crude Mortality Rate
Deaths / Population

Note: This estimates conducted in New York City on using an antibody study, number of actual deaths by CDC and demographic data from the city on the 1st of May 2020

- 1.4% of people infected with SARS-CoV-2 have a fatal outcome and 98.6% recover;
- There is **1 death for every 358 people** in New York City;
- The CMR for people under 65 years old is **0.09%**. The virus is more deadly for older patients specially with underlying medical conditions.



<https://www.who.int/publications/m/item/weekly-epidemiological-update---29-december-2020>

https://www.cdc.gov/mmwr/volumes/69/wr/mm6919e5.htm?s_cid=mm6919e5_X

<https://www.worldometers.info/coronavirus/coronavirus-death-rate/>

Appendix 9

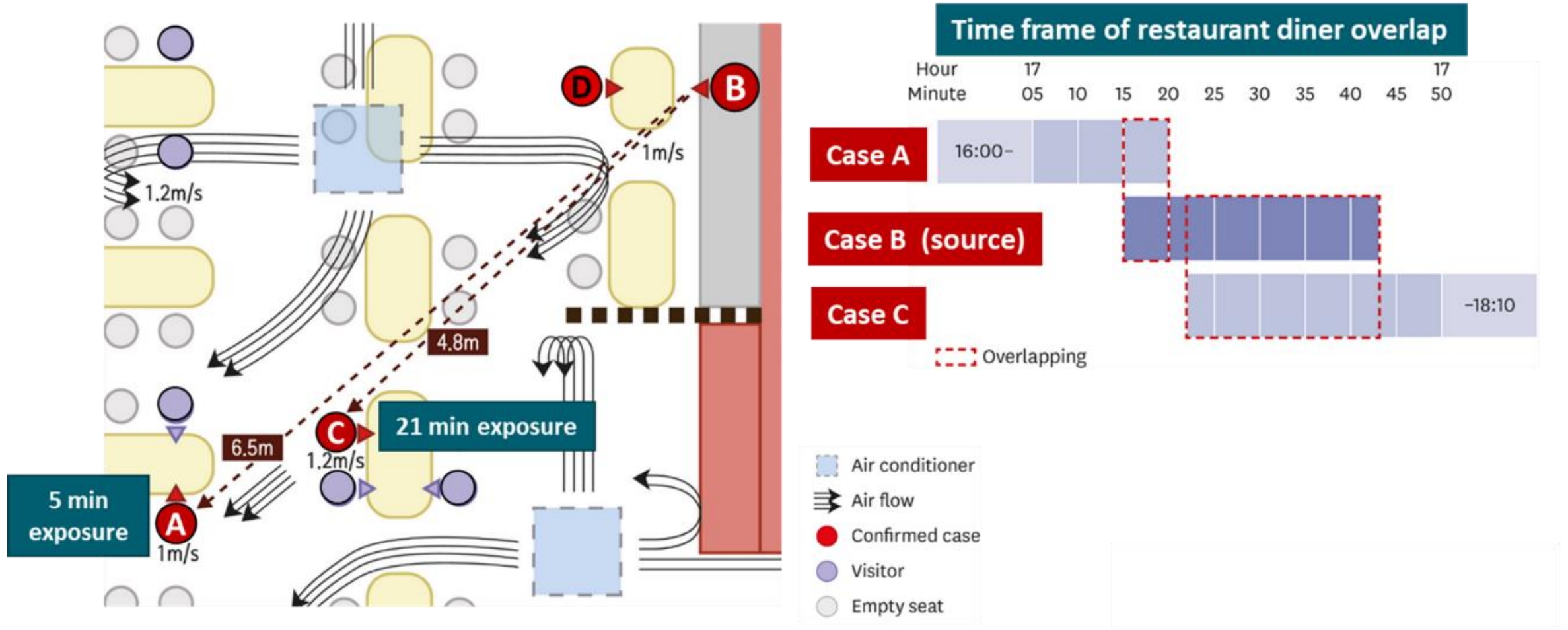
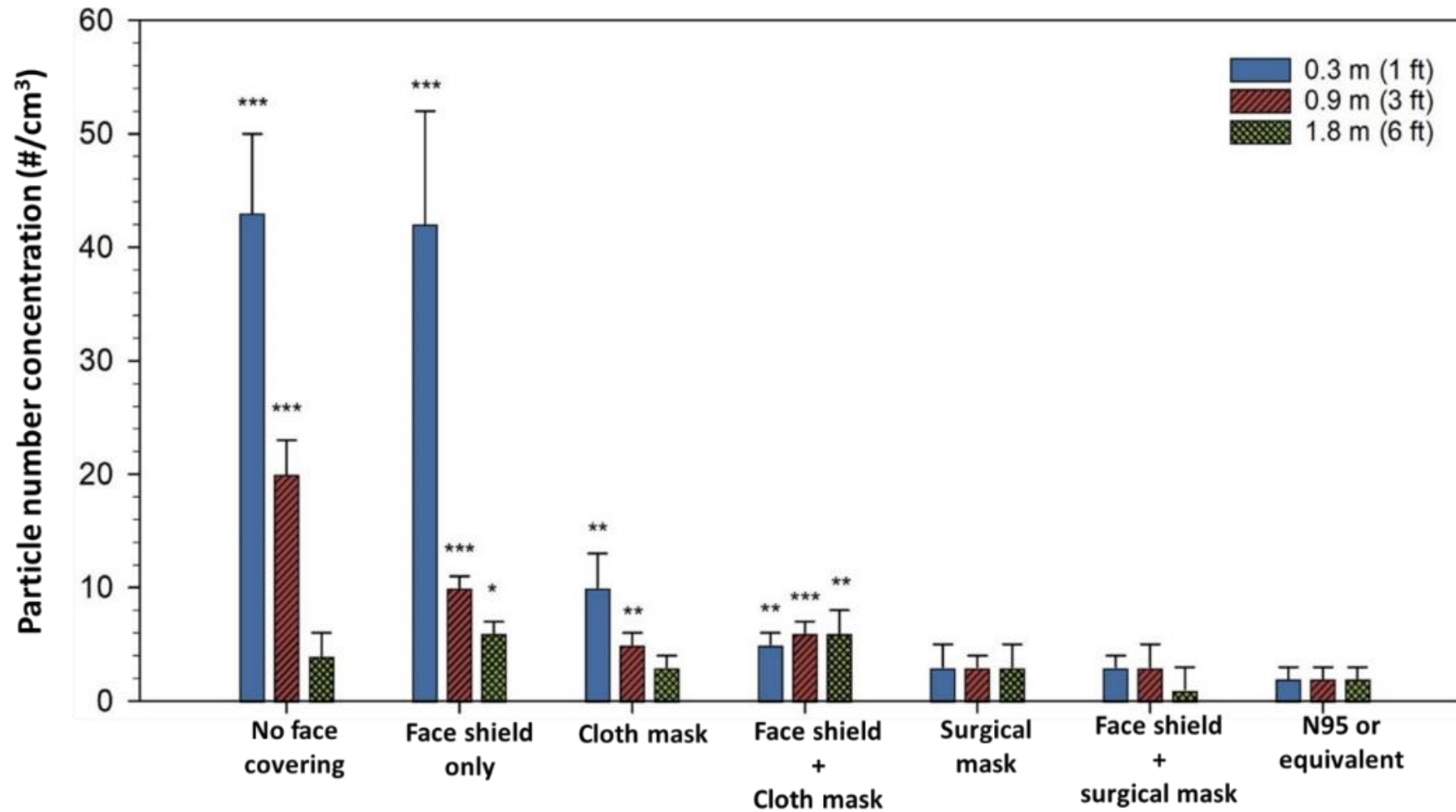


Diagram about the Covid-19 transmission inside a restaurant in Korea. It represents evidence of long-distance droplet transmission of SARS-CoV-2 by direct air flow

<https://jkms.org/DOIx.php?id=10.3346/jkms.2020.35.e415>

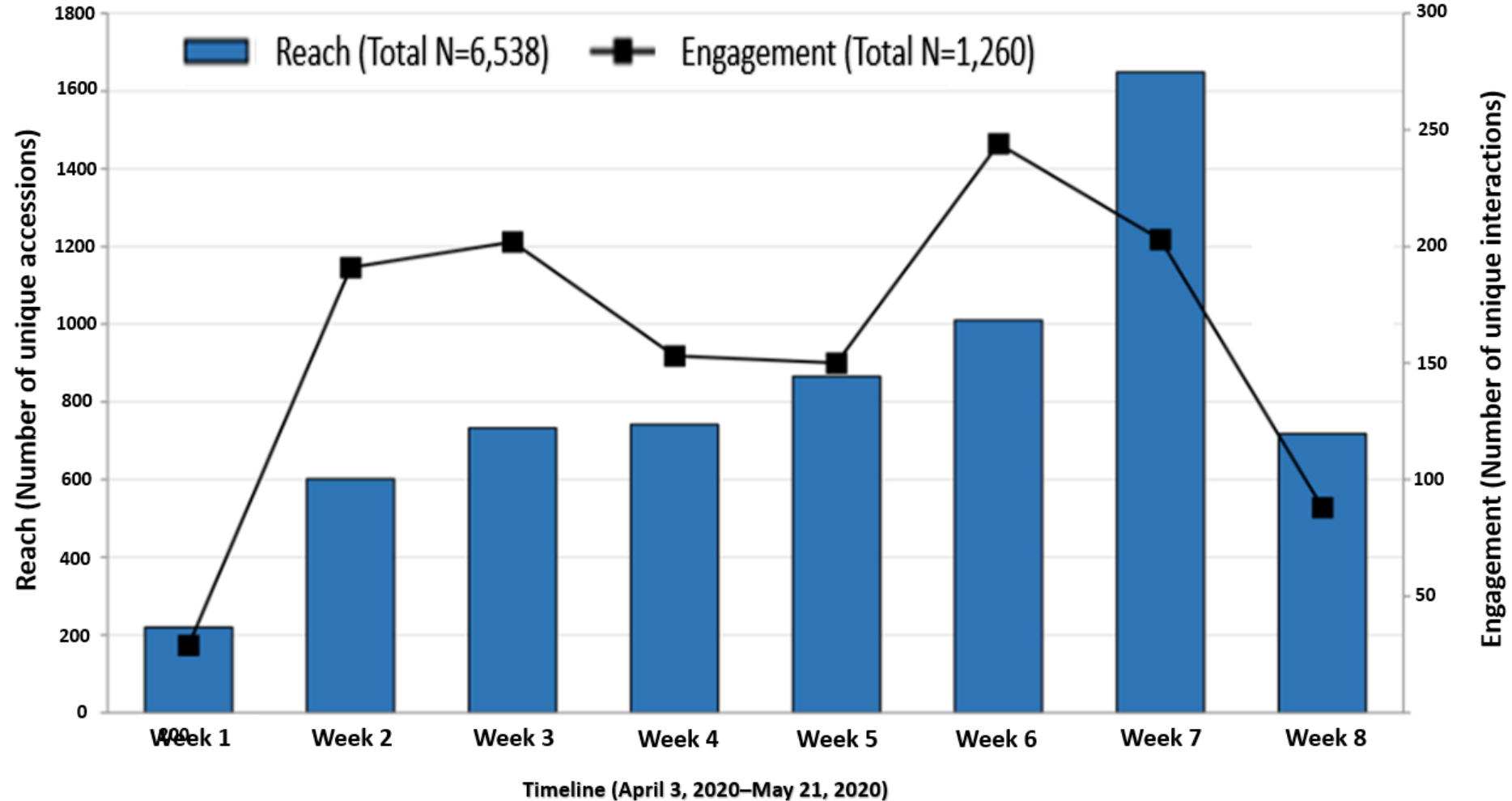
Appendix 10



Concentration of particles from a volunteer that was coughing using different face equipment and at different distances.

<https://www.tandfonline.com/doi/full/10.1080/02786826.2020.1846679>

Appendix 11



Number of weekly unique accessions and interactions in Facebook. The participation metrics were measured inside the Facebook group FAITH! Covid-19 Task Force during the 8-week project where there were recurrent postings of Covid-19 emergency risk management messages

https://www.cdc.gov/pcd/issues/2020/20_0408.htm